Intelligent Contact Center Telephone Administration Guide

BCM 5.0
Contact Center

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NORTEL

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Chapter 1
Getting started

About this guide

The *Intelligent Contact Center Telephone Administration Guide* describes how to set up and configure Contact Center on a Business Communications Manager (BCM) using telset based administration.The information in this document applies to both the BCM50 and the BCM450 platforms running BCM Release 5.0.

About Contact Center

Contact Center is an application that handles incoming calls as efficiently and economically as possible. Contact Center answers calls, then routes the calls to agents in a skillset that most closely matches the needs of the caller. Contact Center routes calls based on the origin of the call, the destination of the call, or the information entered by the caller. Callers can be given high or low priorities. Callers can overflow to different groups or skillsets of agents, transfer out of the system, leave a message, and hear announcements and informative messages.

You can program Contact Center using any two-line display telephone on your telephone system. You can also use the web-based CallPilot Manager to set up and operate Contact Center.

For information about Contact Center features, see the *Intelligent Contact Center Set Up and Operation Guide* (NN40040-301).

Contact Center Update

Intelligent Contact Center is the evolution of the existing Call Center capability on BCM. Intelligent Contact Center offers additional functionality, such as Reporting for Contact Center and Multimedia Contact Center. You can also choose the specific number of agents and skillsets that your business requires.

You purchase Intelligent Contact Center and then purchase the number of agents, skillsets, Reporting, and Multimedia as required. Intelligent Contact Center has increased maximum capacities, for example 80 active agents and 50 skillsets for BCM450, and 50 active agents and 30 skillsets for BCM50. Table 1 shows the capacities available for the BCM450 system. Table 2 shows the capacities available for the BCM50 system.

Table 1 Intelligent Contact Center Capacities for BCM450

Features	Intelligent Contact Center for BCM450
Skillsets	Default 1, maximum 50
Configured agents (available agent IDs)	Maximum 250
Active agents (includes supervisors) Active agents are agents who are logged in to one skillset or a combination of skillsets.	Default 2, maximum 80
Dynamic agent priority levels	20
Dynamic call priority levels	20
Active calls in all skillsets	100
Maximum active calls per skillset	100
Maximum lines configured for Contact Center	100
Voice ports (shared with CallPilot or dedicated)	Minimum 2, default 10, maximum 32
Voice ports with CEC	63
Voice ports without CEC	35
Voice ports for fax with CEC	8
Voice ports for fax without CEC	4
Routing tables per skillset	2
Greetings	150
Maximum time per greeting	1000 mins
Maximum time for all greetings	>370 hours / Gigabyte
Steps per routing table	20
Skillset mailboxes One mailbox is created for each configured skillset. No skillset mailbox is configured by default and a maximum 50 skillset mailboxes can be configured	Default 0, Maximum 50
Supervisor functionality, including call monitoring	Silent monitor
Supervisor Help	Available with Silent Monitor.
Maximum simultaneous monitoring sessions	6
Caller Input Tables	50

Features	**Intelligent Contact Center for BCM450**
Basic Intelligent Caller Input Routing: the ability to route a call to an Operator, Auto Attendant, skillset mailbox or CCR Tree.	Available
Advanced Intelligent Caller Input Routing: the ability to route a call based on multi-digit fixed or variable strings	Available
Delegated Contact Center Administration: If you use a BCM system, there is no dedicated or default CallPilot or Contact Center Administrator user ID and password. The System Administrator can create users with CallPilot and Contact Center rights in Element Manager. For more information, see the Nortel Business Communications Manager 5.0 Administration and Security Guide.	Available
Intelligent Overflow Routing: rules you create to overflow, change the priority of, and move calls to multiple skillsets, a skillset mailbox, an internal or external number, a mailbox, the Auto Attendant or an operator.	Available
Intelligent CLID/DNIS Routing	1000 rules
Overflow rules per skillset	20
Overflow skillsets	Default 0, maximum 49
Service Mode: you specify the start and end times for the day and night skillset for each day of the week	Available
Limited Feature 983 telephone administration	Available
CallPilot Manager	Available
Reporting for Contact Center	Available Must be enabled with keycode
Expected Wait Time	20 tables
Activity Codes	2,000 entries Reporting for Contact Center must be enabled to configure Activity Codes
Multimedia Contact Center	Available Must be enabled with keycode

Table 2 Intelligent Contact Center Capacities for BCM50

Features	Intelligent Contact Center for BCM50
Skillsets	Default 1, maximum 30
Configured agents (available agent IDs)	Maximum 100
Active agents (includes supervisors) Active agents are agents who are logged in to one skillset or a combination of skillsets.	Default 2, maximum 50
Dynamic agent priority levels	20
Dynamic call priority levels	20
Active calls in all skillsets	30
Maximum active calls per skillset	30
Maximum lines configured for Contact Center	30
Voice ports (shared with CallPilot or dedicated)	Minimum 2, default 10, maximum 15
Routing tables per skillset	2
Greetings	50
Maximum time per greeting	30 mins
Maximum time for all greetings	1500 mins
Steps per routing table	20
Skillset mailboxes	Default 0, Maximum 30
Supervisor functionality, including call monitoring	Silent monitor
Supervisor Help	Available with Silent Monitor.
Maximum simultaneous monitoring sessions	6
Caller Input Tables	30
Basic Intelligent Caller Input Routing: the ability to route a call to an Operator, Auto Attendant, skillset mailbox or CCR Tree.	Available
Advanced Intelligent Caller Input Routing: the ability to route a call based on multi-digit fixed or variable strings	Available

Features	Intelligent Contact Center for BCM50
Delegated Contact Center Administration: If you use a BCM system, there is no dedicated or default CallPilot or Contact Center Administrator user ID and password. The System Administrator can create users with CallPilot and Contact Center rights in Element Manager. tact Center rights in Element Manager. For more information, see the Nortel Business Communications Manager 5.0 Administration and Security Guide	Available
Intelligent Overflow Routing: rules you create to overflow, change the priority of, and move calls to multiple skillsets, a skillset mailbox, an internal or external number, a mailbox, the Auto Attendant or an operator.	Available
Intelligent CLID/DNIS Routing	1000 rules
Overflow rules per skillset	20
Overflow skillsets	Default 0, maximum 29
Service Mode: you specify the start and end times for the day and night skillset for each day of the week	Available
Limited Feature 983 telephone administration	Available
CallPilot Manager	Available
Reporting for Contact Center	Available Must be enabled with keycode
Expected Wait Time	20 tables
Activity Codes	2,000 entries Reporting for Contact Center must be enabled to configure Activity Codes
Multimedia Contact Center	Available Must be enabled with keycode

What you can administer through a telephone

Contact Center properties	
Keycode	“To enable the Contact Center keycode” on page 31
Reserved Channels	“Reserved channels” on page 34

Supervisor Help	"Setting the Supervisor Help request timeout" on page 36 "Selecting skillsets supervisors can receive help requests from" on page 38
Caller ID display settings	"Setting Caller ID" on page 35
Lines	"Configuring lines" on page 39
Answer lines status	"Setting the Answer Lines status" on page 41
Reset Administrator password	"Resetting the Contact Center Administrator password" on page 41
Contact Center greetings	"Recording a Contact Center greeting" on page 44 **NOTE**: You must use CallPilot Manager to add Greeting captions.
Skillsets	
Parameters: name, number, control DN, Message Waiting Indicator DN, Method of Distribution, Break Time, Delay Answer, Activity Code and Expected Wait Time settings, service mode, prompt language, attendant extension.	"Setting up a skillset" on page 51 "Setting the Service Modes for skillsets" on page 174
Monitor skillsets	"Monitoring skillsets" on page 179
Skillset mailboxes	"About skillset mailboxes" on page 65
initialize a skillset mailbox	"Initializing a skillset mailbox" on page 68
change a skillset mailbox password	"Skillset mailbox password" on page 71
record skillset mailbox greetings	"Recording skillset mailbox greetings" on page 74
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Log an agent off	"To log an agent off" on page 128
Reset an agent password	"To reset an agent password" on page 130
Monitor agents	"Monitoring agent calls with Silent Monitor" on page 177
Routing	
Intelligent Overflow Routing	"To add Overflow rules" on page 140
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Distribute for step	"To add a Distribute for step" on page 155
Goto step	"Adding a Goto step" on page 156
Transfer step	"Adding a Transfer step" on page 158
Disconnect step	"Adding a Disconnect step" on page 161
CLID/DNIS routing	**NOTE**: You must use CallPilot Manager. You cannot administer CLID/DNIS routing via telephone

Expected Wait Time tables	**NOTE**: You must use CallPilot Manager. You cannot administer EWT Tables via telephone.
Activity Codes	**NOTE**: You must use CallPilot Manager. You cannot administer Activity Codes via telephone.
Caller Input Rule Tables	**NOTE**: You must use CallPilot Manager. You cannot administer Caller Input Rule Tables via telephone.
Advanced Intelligent Caller Input Routing	**NOTE**: You must use CallPilot Manager. You cannot administer Advanced Intelligent Caller Input Routing via telephone.

Audience

This guide is for system administrators who configure, and maintain Contact Center on a BCM. To use this guide you must:

- be an authorized system administrator
- be knowledgeable of CallPilot and Contact Center

Acronyms

The following is a list of acronyms used in this guide.

Table 1

Acronym	Description
BCM	Business Communications Manager
CCR	Custom Call Routing
CDN	Control Directory Number
CFAC	Call Forward All Calls
CFB	Call Forward on Busy
CFNA	Call Forward No Answer
CLID	Calling Line Identification
CO	Central Office
COS	Class of Service
DID	Direct Inward Dialing
DN	Directory Number
DND	Do Not Disturb
DTMF	Dual Tone Multi-Frequency
EWT	Expected Wait Time
MWI	Message Waiting Indication
NVM	Norstar Voice Mail

Symbols and text conventions

These symbols are used to highlight critical information for the BCM system:

Caution: Alerts you to conditions where you can damage the equipment.

Danger: Alerts you to conditions where you can get an electrical shock.

Warning: Alerts you to conditions where you can cause the system to fail or work improperly.

Note: A Note alerts you to important information.

Tip: Alerts you to additional information that can help you perform a task.

Security note: Indicates a point of system security where a default should be changed, or where the administrator needs to make a decision about the level of security required for the system.

Warning: Alerts you to ground yourself with an antistatic grounding strap before performing the maintenance procedure.

Warning: Alerts you to remove the BCM main unit and expansion unit power cords from the ac outlet before performing any maintenance procedure.

These conventions and symbols are used to represent the Business Series Terminal display and dialpad.

Convention	Example	Used for
Word in a special font (shown in the top line of the display)	Pswd:	Command line prompts on display telephones.
Underlined word in capital letters (shown in the bottom line of a two line display telephone)	PLAY	Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons	#	Buttons you press on the dialpad to select a particular option.

These text conventions are used in this guide to indicate the information described.

Convention	Description
bold Courier text	Indicates command names and options and text that you need to enter. Example: Use the **info** command. Example: Enter **show ip** {**alerts**|**routes**}.
italic text	Indicates book titles
plain Courier text	Indicates command syntax and system output (for example, prompts and system messages). Example: `Set Trap Monitor Filters`
FEATURE HOLD RELEASE	Indicates that you press the button with the coordinating icon on whichever set you are using.

Related publications

This section provides a list of additional documents referred to in this guide.

CallPilot Manager Set Up and Operation Guide (NN40170-300)

CallPilot Telephone Administration Guide (NN40170-601)

Intelligent Contact Center Set Up and Operation Guide (NN40170-301)

Intelligent Contact Center Agent Guide (NN40040-101)

Intelligent Contact Center Supervisor Guide (NN40040-102)

Keycode Installation Guide (NN40010-301)

Nortel BCM 5.0 Administration and Security Guide (NN40170-603)

Nortel BCM 5.0 Configuration—Devices Guide (NN40170-500)

How to get Help

This section explains how to get help for Nortel products and services.

Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

http://www.nortel.com/support

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting Help over the phone from a Nortel Solutions Center

If you don't find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

http://www.nortel.com/callus

Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

http://www.nortel.com/erc

Getting Help through a Nortel distributor or reseller

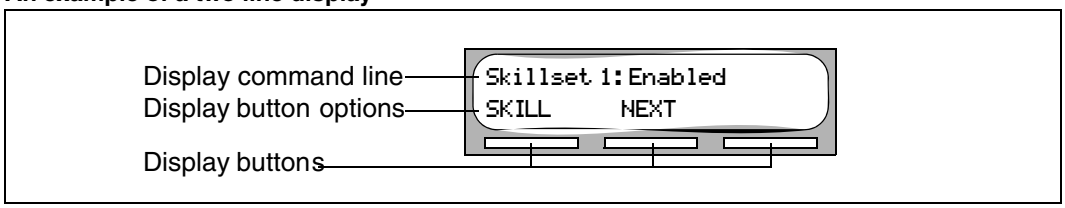
If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

Chapter 2
About Contact Center telephone administration

Setting up Contact Center with a two line display telephone

You cannot use a single line display telephone to set up and administer Contact Center. You must use a two line display telephone. Two line display telephones show Contact Center commands and options. A two line display can show up to three display options at once. In some instances, an option does not have a corresponding display button, and you must select the option by pressing buttons on the diapad.

An example of a two line display



System timeout

If you pause longer than 2 minutes (120 seconds) when you program Contact Center on a two line display telephone, the system times out and ends the session. This is a safety feature that prevents unauthorized use of the system.

For example, if the system times out before you enter all the settings for a skillset, you must use the procedures in "Changing skillset properties" on page 57 to finish setting up the skillset.

Using the dialpad

The buttons on your display telephone dialpad act as both numbers and letters. Each button represents a number and letters of the alphabet.

To enter a character	press the dialpad button that represents the letter or number. Press the button again to see the next letter or number.
To accept a character	press # or press another button. When you press another button, the cursor advances and the display shows the first character on the new button.
To delete a character	press the BKSP display button.

Numbers and letters on the dialpad.

1 1 ' -	2 A B C 2 a b c	3 D E F 3 d e f
4 G H I 4 g h i	5 J K L 5 j k l	6 M N O 6 m n o
7 P Q R S 7 p q r s	8 T U V 8 t u v	9 W X Y Z 9 w x y z
* Quit	0 Q Z Zero q z	# Accepts the displayed letter and "," (comma)

The display can show up to 16 characters. Whether the prompt remains on the display depends on the type of prompt that is displayed.

```
Pswd:1111
OTHR   RETRY   OK
```

This is an example of a display with fewer than 16 characters, where the command line prompt remains on the display.

```
Name:
RETRY   BKSP   OK
```

This display shows the Name: command line prompt.

```
P
RETRY   BKSP   OK
```

When you begin to enter the last name, the Name: command line prompt disappears. For example, if you enter the name Partridge, you press the pad 7 for P, and the display drops the Name: prompt.

```
PARTRIDGE
RETRY   BKSP   OK
```

Although the name is only nine characters long, the command line prompt is not shown on the display after you enter the entire name.

The prompt disappears for these command line prompts:

- Name:
- Log:
- Dest ph:

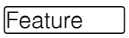
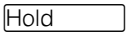
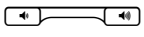
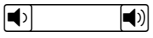
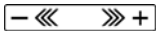
Symbols and conventions used in this guide

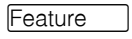
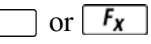
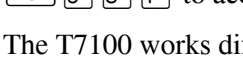
These conventions and symbols are used to represent the Business Series Terminal display and dialpad.

Convention	Example	Used for
Word in a special font (in the top line of the display)	Pswd:	Command line prompts on display telephones.
Underlined word in capital letters (on the bottom line of a two line display telephone)	PLAY	Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons	#	Buttons you press on the dialpad to select a particular option.

About telephone buttons

This table shows the Business Series Terminal buttons. Use the buttons that pertain to the type of telephone you use.

Button name	T7100, T7208, T7316	M7100, M7208, M7310, M7324	M7100N, M7208N, M7310N, M7324N
Feature			
Handsfree	Bottom right-hand button		
Hold			
Volume Control			
Release			

You can enter ,  or  and the code to use a feature. For example, press  to access your mailbox.

The T7100 works differently from other telephones on your system because it does not have line buttons. Where other telephones require that you select a line button to answer a call, on the T7100 terminal you pick up the handset. Where other telephones require you to select a line button to take a call off hold, you press on the T7100 terminal.

On T7100 terminals, you can answer a second call by pressing . Your active call is put on hold and you connect to the waiting call. You can have no more than two active calls at one time.

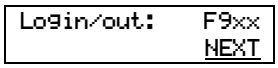
Feature codes

You use Feature Codes to perform Contact Center functions on your telephone.

Feature Codes are assigned during installation. This guide shows the default Feature Codes. Contact Center can also use custom Feature Codes. If the default Feature Codes are used by another application, your system automatically assigns custom Feature Codes. If your System Administrator has assigned custom Feature Codes, you can use the table "Feature Codes" on page 198 to record the Custom Feature Codes.

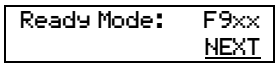
To determine the Feature Codes

1 Press [e] [9] [*] [1].



2 The display shows the name and number of the Log In/Log Out Feature Code. xx represents a number between 00 and 99.

3 Press NEXT.



4 The display shows the name and number of the Ready Mode Feature Code.

5 Press NEXT to see more Feature Codes.

6 When the display shows QUIT you have seen all the Feature Codes.

7 Press [↩] to end the session.

Programming a memory button with a Feature Code

Each Feature Code can be programmed to a memory button. Nortel recommends that you use memory buttons with indicators to program the Feature Codes. A memory button indicator is the triangle next to a memory button.

You can use memory buttons to monitor call activity, and view the Login/Logout and Not Ready status of agents. For information about how the status appears, see the *Intelligent Contact Center Agent Guide* (NN40040-101).

For information about using programmed memory buttons to monitor call activity, see Primary and Secondary alert times in "Skillset properties" on page 48.

To program a memory button

1 Press [e] [*] [3].
Do not lift your handset.

Program Features

2 The display shows **Program Features**.

Press a button QUIT

3 Press a memory button with an LCD indicator.

Feature Code: QUIT

4 Press [e].

F_ QUIT CLEAR

5 Enter the Feature Code number that you want to program.
For example, enter [9] [0] [9] to program the Display Waiting Calls Feature Code. See the tables "Feature Codes used by Contact Center agents" on page 30 and "Agent Feature Codes" on page 30 for the Feature Codes.

Repeat steps 1 through 5 for each Feature Code you want to program.

Programmed

6 The display shows that the button is programmed, and then ends the session.

Use the paper labels that come with your telephone to identify the programmed button. To use the Feature Code, press the labeled button.

Feature Codes used by Contact Center supervisors

Use this Feature Code	To...
Open Mailbox [ ] 9 8 1	• open skillset mailboxes • record skillset mailbox greetings • listen to messages in the skillset mailbox
Operator Settings [ ] 9 8 2	• set or change the operator extension • indicate whether the operator is available • select the day and night service modes for skillsets • change the password for Operator Settings For more information about the Operator Feature Code, see "Setting the Service Modes for skillsets" on page 174 and "Resetting the Operator password" on page 193.
Voicemail DN [ ] 9 8 5	• display the skillset mailbox number (Control DN) for each skillset • display the extension for Message Waiting Indication for the skillset mailbox • reset the passwords of the Contact Center Administrator and the operator For more information about the Control DN, see "Determining a skillset mailbox number" on page 66. For more information about resetting the Operator and Contact Center Administrator passwords, see "Resetting the Contact Center Administrator password" on page 41 and "Resetting the Operator password" on page 193.
Display Waiting Calls Skillset Status [ ] 9 0 9	• view real-time status information about skillsets. You can see how busy your contact center is so that you can adjust skillset staffing • view whether a skillset is enabled or disabled • view the number of agents logged on to the skillset • view the number of calls waiting • view the longest wait time of a call To provide easy, one-button access to the this feature, program a memory button that has an indicator with [ ] 9 0 9 . Refer to "Programming a memory button with a Feature Code" on page 27.
Log on/Log off [ ] 9 0 4	• log agents off if they forget to log off. For information, see "To log an agent off" on page 128.
Monitor agents [ ] 9 0 5	• lets you monitor agents
Supervisor Help [ ] 9 0 6	• lets you take agents' help requests

Not Ready [Feature] 9 0 8	• activate or cancel the Not Ready feature on their telephone. If the work resulting from a call requires extra time to complete, an agent can use the Not Ready Feature Code to prevent Contact Center from routing another call to them. If an agent makes a telephone call, or if a supervisor is monitoring a call, they first use the Not Ready Feature Code to activate the Not Ready feature. When the agent is ready to receive calls, they use this Feature Code to cancel the Not Ready feature and receive calls again. • If an agent does not answer a call within a certain number of rings, the call is returned to the skillset and the agent telephone is automatically placed into Auto Busy Mode or Auto Logout Mode. The agent must manually cancel the Auto Busy Mode feature by using the Not Ready Feature Code to continue to receive calls.

Note: You can use The Log on/Log off and the Not Ready Feature Codes, but they are used primarily by agents. For information about the Feature Codes used by agents, see "Feature Codes used by Contact Center agents" on page 30.

Note: While you use a feature, if you press the Feature [Feature] button your present feature session ends. Do not press [Feature] unless you want to end your current feature session.

Feature Codes used by Contact Center agents

If you have Custom Feature Codes, record them in the table "Feature Codes" on page 198.

Agent Feature Codes

For more information about Agent Feature Codes, see the Intelligent *Contact Center Agent Guide* (NN40040-101). For more information about Feature Codes used by supervisors, see the "Feature Codes used by Contact Center supervisors" on page 28.

Agents use this Feature Code	To...
Open Mailbox [ ] 9 8 1	• access messages in a skillset mailbox
Log on/Log off Monitor skillsets [ ] 9 0 4	• log on when they are in the office • view the status of the skillsets they are logged on to. Agents can program a memory button with the Log on/Log off Feature Code. The status of the calls waiting in the skillset is shown by the flash rate of the indicator. For more information, see "Skillset properties" on page 48.
Supervisor Help [ ] 9 0 6	• requests help from a supervisor
Activity Codes [ ] 9 0 7	• start a session where they can enter Activity Codes
Not Ready [ ] 9 0 8	• activate or cancel the Not Ready feature on their telephone. If the work resulting from a call requires extra time to complete, an agent can use the Not Ready Feature Code to prevent Contact Center from routing another call to them. If an agent makes a telephone call, or if a supervisor is monitoring a call, they first use the Not Ready Feature Code to activate the Not Ready feature. When the agent is ready to receive calls, they use this Feature Code to cancel the Not Ready feature and receive calls again. • If an agent does not answer a call within a certain number of rings, the call is returned to the skillset and the agent telephone is automatically placed into Auto Busy Mode or Auto Logout Mode. The agent must manually cancel the Auto Busy Mode feature by using the Not Ready Feature Code to continue to receive calls.
Display Waiting Calls [ ] 9 0 9	• see, during peak call periods, which skillsets have the most call activity.

Chapter 3
Contact Center general properties

To set the Contact Center general properties:

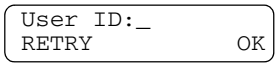
- set the number of Reserved channels
- set the CLID parameter
- set the Supervisor Help request timeout value
- select from which skillsets a supervisor can receive help requests
- configure the lines to be answered by Contact Center
- set the line answering status

To enable Contact Center using F9*8

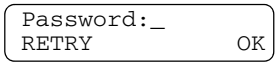
If you do not have Contact Center as your primary application, you must enable the Contact Center keycode. You enable the Contact Center keycode using Feature 9*8 or through Element Manager. See the *Keycode Installation Guide* for more information about obtaining and enabling a keycode through Element Manager.

To enable the Contact Center keycode

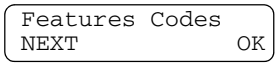
1 Press [↩] [9] [*] [8].



2 Log in by following the voice prompts or the display button options.



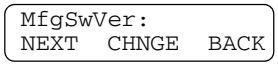
3 Enter your password and press OK.
The Features Codes are displayed.



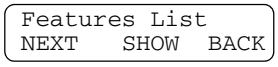
4 Press OK to continue.
The system ID (SID) is displayed.

5 Press NEXT.

6 Enter your sequence ID, and press NEXT.
The Manufacturing Software Version is displayed.



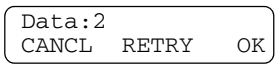
7 Press NEXT.



8 Press SHOW to scroll through the Features List and select the feature you want.

9 In this example, the feature is VM Seats. Press CHNGE to enter the feature data value.
The current feature data value is displayed.

10 Press CHNGE to enter the new feature data value. For example, if you have two voice mail seats, enter 2.

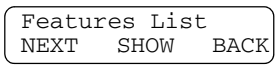


11 Enter the new feature data value. Press OK to accept the data feature value.

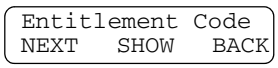
12 The new feature data value are displayed. Press BACK to return to the feature.

13 Press NEXT to scroll through the feature list and select the feature you want. Repeat steps above to add more features. Add all features and feature data values before you enter the keycode.

14 After you add all of the features you have purchased, press BACK.
The Features List is displayed.



15 Press NEXT to continue to the Keycode display.



16 Press SHOW to enter the keycode.
The keycode is a 24-digit code. Enter the keycode in three 8-digit sets.

17 Press CHNGE to enter the first eight digits of the keycode.

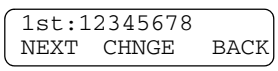
18 Enter the first eight digits of the keycode and press OK.

19 Press CHNGE to enter the second set of eight digits of the keycode

20 Enter the second set of eight digits of the keycode, and press OK.

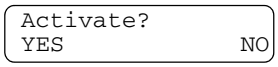
21 Press CHNGE to enter the third set of eight digits of the keycode, and press OK.

22 Enter the third set of eight digits of the keycode, and press OK.

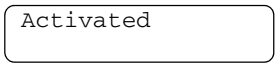


23 The first eight digits are displayed. Press BACK to continue.

24 Entitlement code (Keycode) is displayed. Press BACK to continue.



25 Activate? is displayed. Press YES to activate the features.



26 Activated is displayed.

Setting Contact Center general properties

When you set up Contact Center you must assign values for the general properties. The following procedures are for the general Contact Center properties.

Reserved channels

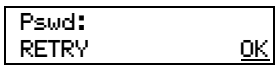
Reserved channels are voice channels that are reserved for use by Contact Center. If you reserve channels for Contact Center, you ensure that callers are played skillset announcements, and CallPilot does not use all of the voice channels.

A reserved channel is used when:

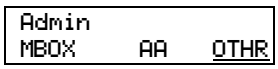
- a Contact Center greeting plays to a caller
- Off-premise Message Notification notifies you that there is a message in a skillset mailbox

To set Contact Center general properties

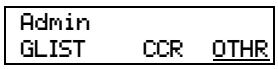
1 Press [phone] 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



2 Enter the user password and press OK.

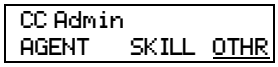


3 Press OTHR.

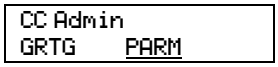


4 Press OTHR.

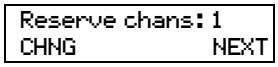
5 Press CC.



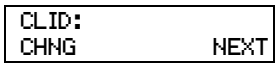
6 Press OTHR.



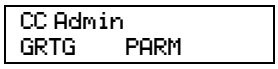
7 Press PARM.



8 Press CHNG if you want to change the number of reserved channels (0 - 46) and press NEXT
or
press NEXT.



9 Press CHNG if you want to change how CLID information is displayed.
Num Only displays the caller's number for 3 seconds and then the skillset name. No CLID only displays the skillset name.Name/Num displays the caller's number for 3 seconds and then the skillset name - if the caller's name is not available, the caller's number is shown instead.
or
Press NEXT



10 Press [phone] to end the session.

Setting Caller ID

You can select how you want caller information to be displayed on agent telephones:

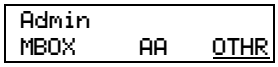
- Name and number: the display shows the caller's name for 3 seconds and then the skillset name. If the caller's name is not available, the caller's number is shown.
- Number only: the display shows the caller's number for 3 seconds and then the skillset name.

- No Caller ID: the display shows the skillset name.

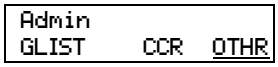
To set Caller ID

1 Press [Config] 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see *the Nortel Business Communications Manager 5.0 Administration and Security Guide.*

2 Enter the user password and press OK.

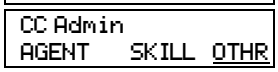


3 Press OTHR.

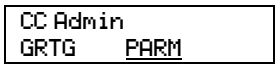


4 Press OTHR.

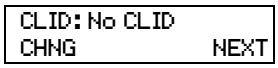
5 Press CC.



6 Press OTHR.



7 Press PARM.



8 Press NEXT until this display appears.
Press NEXT to select no CLID
or
press CHNG to select Number Only or Name and Number.

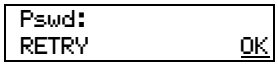
9 Press [End] to end the session.

Setting the Supervisor Help request timeout

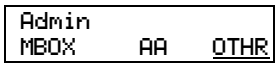
The Supervisor Help Request Timeout is when to escalate a request if the chosen supervisor does not answer the help request. You can enter a value between 1 and 60 seconds. The default is 12 seconds.

To set the Supervisor Help request timeout

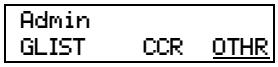
1 Press [Menu] 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



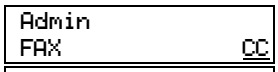
2 Enter the user password and press OK.



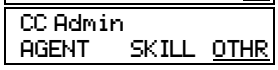
3 Press OTHR.



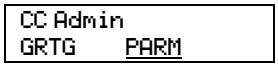
4 Press OTHR.



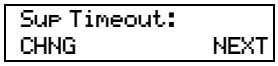
5 Press CC.



6 Press OTHR.



7 Press PARM.



8 Press NEXT until this display appears.
Press NEXT to accept the default value of Supervisor timeout
or
press CHNG to enter a different value.
The default value is 12 seconds. The range is from 1 to 60 seconds.

9 Press [End] to end the session.

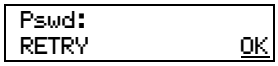
Selecting skillsets supervisors can receive help requests from

The Supervisor Help From setting lets you determine where escalated requests go.

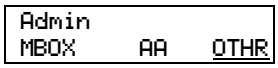
- All skillsets: sends an unanswered help request system-wide to all Contact Center supervisors.
- Agent's skillsets only: sends an unanswered help request to only the supervisors logged in to skillsets that the agent is assigned to. From the Supervisor Help From options select all skillsets or agent's skillsets only.

To select skillsets

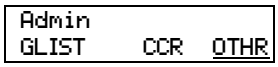
1 Press [Phone] 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



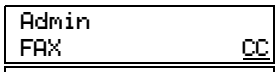
2 Enter the user password and press OK.



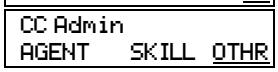
3 Press OTHR.



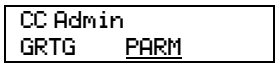
4 Press OTHR.



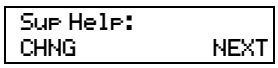
5 Press CC.



6 Press OTHR.



7 Press PARM.



8 Press NEXT until this display appears.
Press NEXT to accept the default value of All Skillsets
or
press CHNG to choose Agent's skillsets only.

9 Press [Phone] to end the session.

Configuring lines

Before Contact Center can answer an incoming line, you must assign the line to be answered by a Contact Center skillset.

For each line that you want Contact Center to answer, you assign:

- the line to be answered by Contact Center
- the skillset that calls on this line go to
- the number of rings before the line is answered

You can record your line answering information in the table "Line answering" on page 206.

You must disable a skillset and wait until there are no calls in the skillset before you can add lines to it. You cannot add lines to a skillset while it is in use. For information about disabling a skillset, see "Disabling a skillset" on page 56.

Lines that are programmed to be answered by Contact Center must not be programmed to be answered by another peripheral or application.

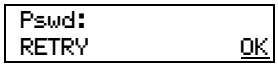
To delay calls being answered, you can assign Contact Center to answer incoming calls after a specified number of rings. The number of rings ranges from zero to 12. If the number of rings is zero, Contact Center answers immediately.

For analog lines equipped with Caller ID, you must set the number of rings to two or more. Caller ID information is not provided until just prior to the second ring, so if you set the number of rings to zero or one, Caller ID information is not relayed.

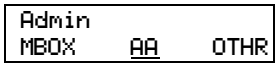
Long distance charges start when a call is answered by Contact Center. To minimize long distance charges, set the ring count higher than 0 so that calls spend more waiting time in a ringing state.

To configure lines for Contact Center

1 Press [Menu] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.

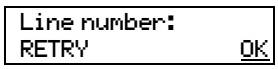


2 Enter the user password and press OK.

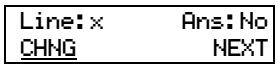


3 Press AA.

4 Press LINES.

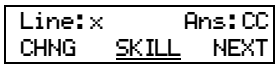


5 Enter the line number and press OK.

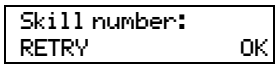


6 Press CHNG.

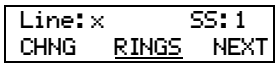
7 Press CHNG.



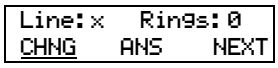
8 Press SKILL.



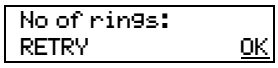
9 Enter the number of the skillset you want to answer the line and press OK.



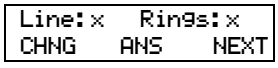
10 Press RINGS.



11 Press CHNG.



12 Enter the number of rings and press OK.

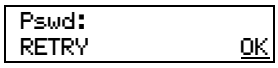


13 Press NEXT to configure another line
or
press [End] to end the session.

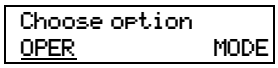
Setting the Answer Lines status

The Answer Lines status determines whether Contact Center answers the assigned lines. If the Answer Line status is set to Yes, Contact Center answers the lines assigned as Contact Center and CallPilot answers the lines assigned as AA. If the Answer Line status is set to No, neither Contact Center nor CallPilot answers lines.

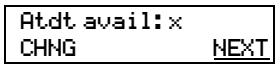
To set the Answer Lines status



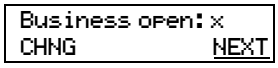
1 Press [⚙] [9] [8] [2].
Enter the Operator password, and then press OK.
The default Operator password is [6] [7] [3] [7] [2] [8] [6] [7] (Operator). To change the Operator password, see "Resetting the Operator password" on page 193.



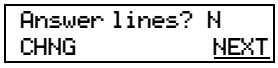
2 Press OPER.



3 Press NEXT



4 Press NEXT.



5 Press CHNG.
If you set Answer Lines to N the display shows Disabling...
If you set Answer Lines to Y the display shows Enabling...

6 Press [☎] to end the session.

Resetting the Contact Center Administrator password

If you use a BCM system, there is no dedicated or default CallPilot or Contact Center Administrator user ID and password. For BCM, you can create users with CallPilot and Contact Center rights in Element Manager. You can also change the users' passwords in Element Manager. For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*

Chapter 4
Contact Center greetings

About Contact Center greetings

Contact Center greetings encourage callers to stay on the line until an agent is available. You can record greetings in different languages and change them as often as you like. You can record up to 150 greetings in BCM450. You can record up to 50 greetings in BCM50.

You can include information in your greetings such as:

- your hours of service
- a request for callers to have their account number ready
- how to leave a message
- an announcement of a sale
- product lists
- upcoming special events

Types of Contact Center greetings

You can record different types of greetings for Contact Center. Before you record your greeting, determine what information the greeting includes. When you prepare your greeting, include important times and dates. Keep greetings as short and concise as possible. Use the following examples of greetings as a reference.

General company greeting	The general company greeting tells callers they have reached the correct company. It can also include the location and business hours of your company. *"Thank you for calling Bridgestone Computers. We are located at 52 Main Street. Our hours of service are Monday to Friday from 8:00 until 5:00. Please stay on the line and an agent will be with you as soon as possible. Or press 0 to leave a message and one of our agents will return your call."*
Please wait greeting	Please wait greetings encourage callers to stay on the line. *"All our agents at Bridgestone Computers are currently busy, but please hold as your call is very important to us."*
Information greeting	An information greeting provides messages and announcements to callers. "*Thank you for calling Bridgestone Computers. This week we have extended our hours until we sell all spring merchandise. We will be open until 9:00 pm Monday through Thursday, and we will be open until midnight on Friday! Please come in and see us at 52 Main Street."*

Transfer greeting	A transfer greeting lets a caller transfer their call. *"Please press 1 to leave a message and one of our agents will return your call. Press 2 to return to the previous choices."*
Non-business hours greeting	Your non-business hours greeting will be played after your business is closed: "*You have reached Bridgestone Computers. Our hours of service are Monday to Friday from 8:00 until 12:00 and 1:00 until 5:00. To leave a message, please press 0. An agent will return your call when we re-open. Thank you for calling.*"

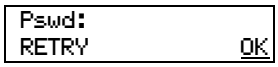
Recording a Contact Center greeting

Before you record a greeting, write the greeting out so that you include everything that you want to say.

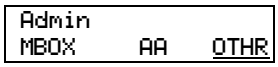
We recommend that you record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, callers must wait in a skillset a longer time before they hear another greeting.

To record a Contact Center greeting

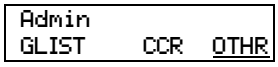
1 Press [⌂] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



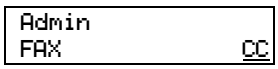
2 Enter the user password and press OK.



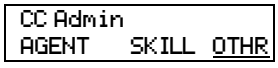
3 Press OTHR.



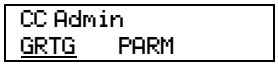
4 Press OTHR.



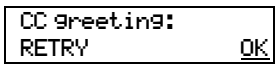
5 Press CC.



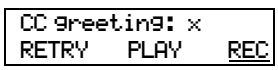
6 Press OTHR.



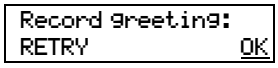
7 Press GRTG.



8 Enter the number of the greeting you want to record and press OK.

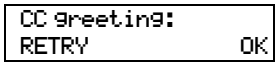


9 Lift the handset and press REC.



10 Record your greeting using the telephone handset.
Do not use handsfree.
When you are finished press OK.

11 Press PLAY to listen to the greeting
or
press RETRY to re-record the greeting
or
press OK to save the greeting.



12 Enter another greeting number and press OK to record another greeting
or
press ☎ to end the session.

Chapter 5
Setting up skillsets

About skillsets

Contact Center skillsets answer and distribute calls to agents as they become available. Skillsets hold calls for different contact center departments, such as sales and technical support.

For BCM450, you can have a maximum of 50 skillsets for Contact Center.

For BCM50, you can have a maximum of 30 skillsets for Contact Center.

You cannot change the properties of a skillset while it is enabled. You must disable the skillset. If you want to change the CDN, disable the skillset and wait until there are no calls in the skillset before you change the CDN.

How incoming calls are sent to a skillset

Incoming calls are sent to a skillset in one of the following ways:

- You assign a line to be answered directly by a skillset. For information about configuring lines, see "Configuring lines" on page 39.

- A receptionist, agent or subscriber receives a call and transfers the call to a skillset. They can transfer the call to a skillset by pressing [Transfer] [7] [0] or TRANSFER and entering the CDN of the skillset. The receptionist, agent or subscriber must not use the Call Pickup feature.

- The Automated Attendant or a CCR Tree answers the call and the caller makes a selection that routes them to the CDN of the skillset.

- Calls can be forwarded to the Voicemail extension of the skillset by Call Forward All Calls (CFAC), Call Forward No Answer (CFNA) or Call Forward On Busy (CFB). For information about these features, see the *Nortel Business Communications Manager 5.0 Configuration—Device Guide*.

Note: Agents are restricted in how they can use CFAC, CFNA and CFB. For more information, see "Important considerations about how agents use features" on page 194.

Skillset properties

Skillset number	Number of the skillset in BCM450: 1 to 50. Number of the skillset in BCM50: 1 to 30.
Control DN	The Control Directory Number is the extension associated with the skillset. Incoming calls transfer to the CDN of each skillset from extensions, the Automated Attendant or Custom Call Routing. The CDN is the skillset mailbox number. Do not plug telsets into the extension associated with the CDN. When you assign a CDN to a skillset: • If a telephone or any other device uses the same extension the contact center will not answer calls. • The system assigns a skillset mailbox that uses the CDN as its mailbox number. You must initialize the mailbox before you can use the skillset or the mailbox. • Do not rename a telephone DN to a telephone DN used by Contact Center. • It is possible for i2004 devices to be assigned to the DN used by Contact Center. The user does not receive an error message if this happens, even though i2004 devices usually warn a user if there are conflicting telephone DNs. Therefore, it is imperative that the i2004 programming record contains a list of CDNs used by Contact Center.
Name	The skillset name is displayed: • on Contact Center displays to identify the skillset • in reports • as the skillset mailbox name The skillset name can be a maximum of 16 characters. If you do not enter a name, the skillset name defaults to *SKILLx* where *x* is the skillset number. The name for each skillset is the same as the skillset mailbox name.
MWI ext (Message Waiting Indication extension)	The Message Waiting Indication extension is an optional telephone number that indicates that a skillset mailbox has messages waiting. The MWI extension that you assign shows *Message for you* on the telephone display when there are new messages in the skillset mailbox. The MWI DN defaults to None. If you forget the MWI extensions for a skillset mailbox, you can view the MWI extensions by using the procedure "Determining a skillset mailbox number" on page 66. Note: If you plan to use Attendant Extension, you must enter an MWI DN. You can use MWI DN without an attendant extension, but you cannot configure an attendant extension without an MWI DN. The MWI DN must be a different number than the attendant extension.
Method of Call Distribution	The method of call distribution determines to which of several available agents to route the call. There are two methods of call distribution: Longest Idle and Preferred. Longest Idle routes the call to the agent who has been available the longest. Preferred routes the call to the agent with the highest priority (best qualified agent is 1). If there are several agents with the highest priority, the agent available longest with that priority is selected. The default method of call distribution is Longest Idle.

Break Time	Break Time is a time period for agents to complete paperwork after they finish a call. After an agent completes a call, they are taken out of the skillset for the Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code. For more information, see "Not Ready" on page 29. The Break Time period can last from zero to 59 minutes, 59 seconds. The Break Time defaults to 30 seconds. You can change the Break Time period to zero if an agent does not need a Break Time. The Agent Configurable Break Time feature is used to configure Break Time on a per-agent basis, as opposed to a skillset-wide basis. In the CallPilot UI, click the agent configuration. The administrator will have the option of specifying a break time for the agent. This new break time will override the break time specified in the skillsets for that particular agent. If no agent-specific break time is necessary, the administrator can also select the default skillset Break Time option to use the skillset-wide break time. The Agent Configurable Break Time feature is only available using CallPilot Manager.
Delay Answer	Delay Answer is a toll-saving feature that prevents Contact Center from answering calls and playing greetings when there are no agents available. When a call comes in on a line belonging to a skillset that has no free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever happens first. During the Delay Answer time, the waiting callers hear ringback. To activate the Delay Answer feature, enter a time for Delay Answer. The Delay Answer time can be a minimum of zero seconds and a maximum of 10 minutes. The default Delay Answer time is 00:00.
Primary Alert **Secondary Alert**	Alert times are time limits for calls waiting in skillsets. You can set the alert time for all calls for each skillset. When the alert time has passed, it produces a flash on a memory button indicator. A slowly flashing indicator alerts you that a call has exceeded the Primary alert time. A quickly flashing indicator alerts you that a call has exceeded the Secondary alert time. The indicator stops flashing when the calls are handled. You assign alert times in minutes and seconds. There is no default value for alert times. Secondary alerts must be greater than primary. Agents do not have to be logged on to see the Display Waiting Calls memory button flashing. A memory button must be programmed with the Display Waiting Calls Feature Code and the Primary alert time must be set up for the memory button to show waiting calls status.
Attendant extension	The attendant extension is the extension used if a caller presses the Operator key during a greeting step, a transfer step, or while listening to a mailbox greeting. The attendant extension is optional. If you do not assign an attendant extension, the call is sent to the system attendant extension. Note: You must enter an MWI DN, before you enter an attendant extension. If you enter an attendant extension without an MWI DN assigned, you receive an error message prompting you to enter the MWI DN The attendant extension must be different than the MWI DN.
Language preference	Language preference can be either Primary or Alternate. The language preference is the language choice used for prompting callers who transfer to the Automated Attendant or CCR. You can choose a language preference only if your system is configured as bilingual.

Activity Codes	Activity Code entry types are Prompted and Optional. Optional is the default. If you select Optional, an Activity Code session is not automatically displayed on the agent's telephone, but they can press F907 and enter Activity Codes. If you select Prompted, the agent is prompted to enter Activity Codes on their telephone. If you do not have Reporting for Contact Center enabled on your system, this setting does not appear.
Expected Wait Time	Expected Wait Time parameters are: **EWT sample**: How many previous calls are used to calculate EWT. You can enter a number between 2 and 256 calls. **EWT Increase Allowed**: Enabled by default, which means that EWT is recalculated if it increases, and the appropriate EWT greeting is played. If not enabled, callers do not hear recalculated expected wait times if the wait time increases. Whether enabled or not, callers hear the appropriate EWT greeting if the wait time decreases. **Initial Call Duration**: The Initial Call Duration is used to compute expected wait time until sufficient call statistics are obtained. The average call duration is updated whenever a call is released from an agent. This can be a value between 00:01:00 and 24:00:00. The default is 00:03:00.
Service Mode	The service modes are: Auto, Day, Night, 24 Hour. The default is 24 hour operation. For more information about Service Mode see "Setting the Service Modes for skillsets" on page 174.

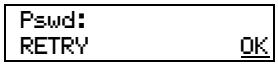
Note: Although you can set Activity Code and Expected Wait Time parameters through [✆] [9] [8] [3], you must use CallPilot Manager to create Activity Codes and Expected Wait Time tables. For more information, see the *Intelligent Contact Center Set Up and Operation Guide* or CallPilot Manager online help.

Setting up a skillset

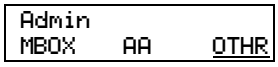
You can record skillset properties in the table "Contact Center skillsets" on page 200.

To set up a skillset

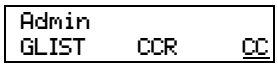
1 Press ✆ 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



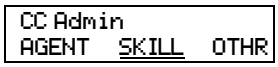
2 Enter the user password and press OK.



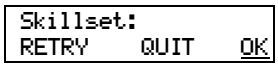
3 Press OTHR.



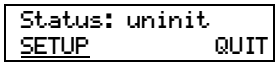
4 Press CC.



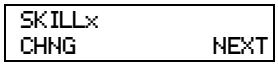
5 Press SKILL.



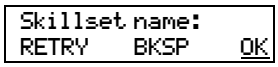
6 Enter the number of the skillset you want to set up and press OK.



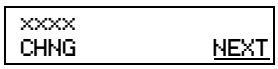
7 Press SETUP.



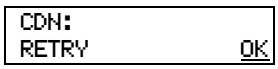
8 Press CHNG to assign a name to the skillset
or
press NEXT if you do not want to assign a name to the skillset and go to step 10.
If you do not enter a skillset name the skillset name defaults to SKILLx, where x is the skillset number, as shown here.



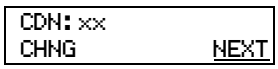
9 Enter the skillset name and press OK. For information about entering characters on the dialpad, see "Using the dialpad" on page 24.



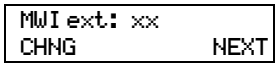
10 The skillset name is displayed.
Press NEXT.



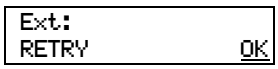
11 Enter the CDN of the skillset and press OK.



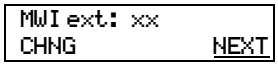
12 Press NEXT.



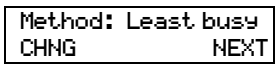
13 If you want to assign an MWI extension, press CHNG
or
if you do not want to assign an MWI extension, press NEXT and go to step 15.
You must assign an MWI extension, if you plan to assign an attendant extension.



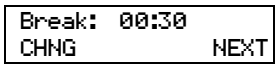
14 Enter the extension of the telephone you want to use for MWI and press OK.



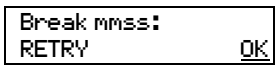
15 Press NEXT.



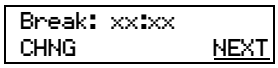
16 Press CHNG to change the method of call distribution to Preferred (Prefer) and press NEXT
or
press NEXT to accept the default of Longest idle (Least busy).



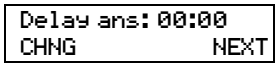
17 Press CHNG if you want to change the default Break time
or
press NEXT to accept the default time 00:30 and go to step 19.



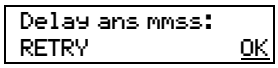
18 Enter the Break time and press OK.
This is a four digit field. Add a zero to any single digit hour or minute.



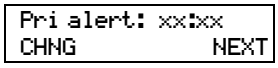
19 Press NEXT.



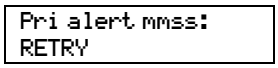
20 Press CHNG to set up a Delay Answer time
or
press NEXT and go to step 22.



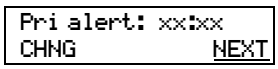
21 Enter a Delay Answer time and press OK.
This is a four digit field. Add a zero to any single digit hour or minute.



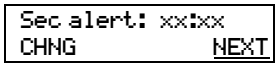
22 Press CHNG to set a Primary Alert time
or
press NEXT and go to step 28.



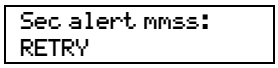
23 Enter the Primary Alert time.
This is a four digit field. Add a zero to any single digit hour or minute.



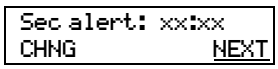
24 The display shows the Primary Alert time.
Press NEXT.



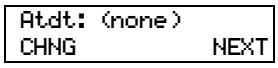
25 Press CHNG to set a Secondary Alert time
or
press NEXT and go to step 28.



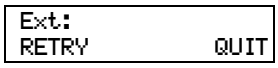
26 Enter the Secondary Alert time.
This is a four digit field. Add a zero to any single digit hour or minute.



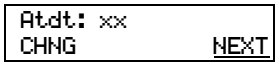
27 The display shows the Secondary Alert time.
Press NEXT.



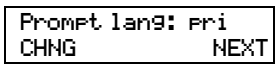
28 Press CHNG to assign an attendant to the skillset
or
press NEXT and go to step 30.
You must enter an MWI DN, before you enter an attendant extension.



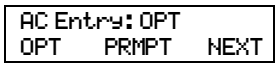
29 Enter the extension number of the attendant set.



30 Press NEXT.

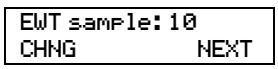


31 Press CHNG to use the alternate language prompts and press NEXT
or
press NEXT to use the primary language prompts.



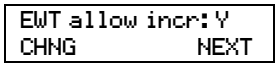
32 Press NEXT if your Contact Center does not use Activity Codes and go to step 33
or
if your Contact Center uses Activity Codes, select the Activity Code entry type: OPT for Optional, PRMPT for Prompted and press NEXT.
This prompt appears only if you have Reporting for Contact Center enabled on your system.

NOTE: Although you can set this Activity Code parameter by telephone, you must use CallPilot Manager to create Activity Codes. For more information, see the *Intelligent Contact Center Set Up and Operation Guide* or CallPilot Manager online help.

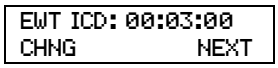


33 If you use Expected Wait Time, enter how many calls you want to use to calculate ETW. The range is 2 to 256 calls. The default is 10.

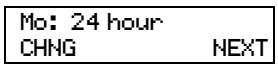
If you do not use Expected Wait Time, go so step 36.



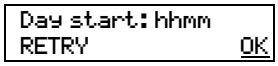
34 If you use Expected Wait Time, select whether you want EWT to be recalculated if it increases, and the appropriate EWT greeting to be played. The default is Y.



35 If you use Expected Wait Time, enter the Initial Call Duration. This can be a value between 00:01:00 and 24:00:00, and is used to compute expected wait time until sufficient statistics are obtained The default of 3 minutes is shown.
Press CHNG if you want to change the default
or
press NEXT to accept the default time and go to step 36.



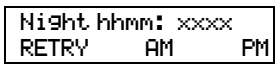
36 Press CHNG to change the service mode for Monday
or
press NEXT.



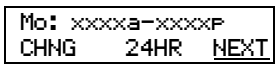
37 Enter the Day Routing Table start time and press OK.
This is a four digit field. Add a zero to any single digit hour or minute.

38 Press AM or PM.

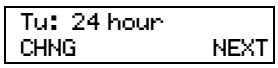
39 Enter the Night Routing Table start time and press OK.
This is a four digit field. Add a zero to any single digit hour or minute.



40 Press AM or PM.



41 The start times for the Day and Night Routing Tables for Monday are shown.
Press NEXT.



42 Repeat steps 37 through 41to set up the Day and Night Routing Tables for the rest of the week.

43 Press ☎ to end the session
or
repeat steps 4 through 42 to set up another skillset.

Enabling a skillset

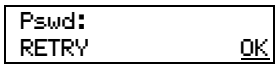
After you set up a skillset, calls will not be answered until you enable it. If you disable a skillset, no new calls are accepted in the skillset. Calls that are in the skillset are distributed until the calls are ended.

Before you can enable a skillset you must:

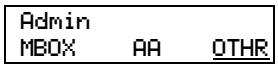
- set up the skillset using the procedure "To set up a skillset" on page 51
- initialize and record a greeting for the skillset mailbox using the procedure "Initializing a skillset mailbox" on page 68
- set up the Day and Night Routing Tables using the procedures in Chapter 10, "Routing table administration," on page 147.

To enable a skillset

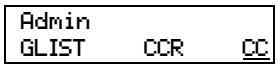
1 Press ✆ 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



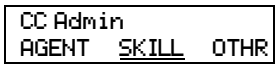
2 Enter the user password and press OK.



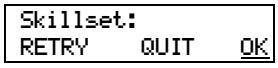
3 Press OTHR.



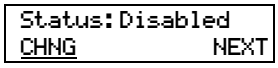
4 Press CC.



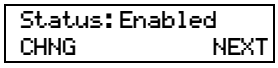
5 Press SKILL.



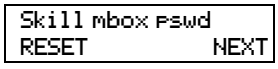
6 Enter the number of the skillset you want to enable and press OK.



7 Press CHNG to change the status from disabled to enabled.



8 The display shows that the skillset is enabled.



9 Press RESET to reset the password for the skillset mailbox
or
press NEXT to continue.

10 Press ☎ to end the session.

Disabling a skillset

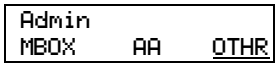
You must disable a skillset if you want to change the skillset properties or administer the lines.

If you disable a skillset, no new calls go to the skillset. Any calls that are in the skillset are distributed until the calls are ended.

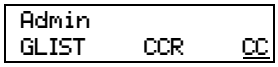
To disable a skillset

1 Press [phone] 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*

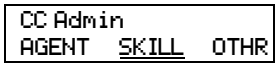
2 Enter the user password and press OK.



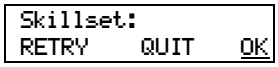
3 Press OTHR.



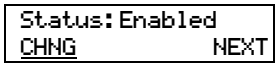
4 Press CC.



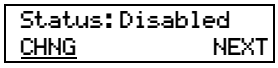
5 Press SKILL.



6 Enter the number of the skillset you want to disable and press OK.



7 Press CHNG to change the status from enabled to disabled.



8 The display shows that the skillset is disabled.

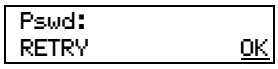
9 Press [phone] to end the session.

Changing skillset properties

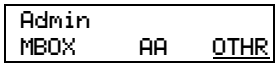
You cannot change the properties of a skillset while it is enabled. You must disable the skillset. If you want to change the CDN, disable the skillset and wait until there are no calls in the skillset before you change the CDN.

To change a skillset

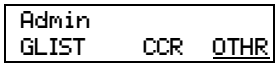
1 Press ✆ 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



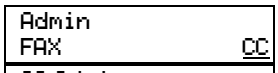
2 Enter the user password and press OK.



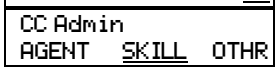
3 Press OTHR.



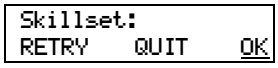
4 Press OTHR.



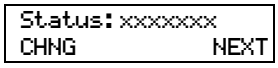
5 Press CC.



6 Press SKILL.

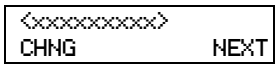


7 Enter the number of the skillset you want to change and press OK.

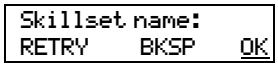


8 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable the skillset Press CHNG and press NEXT to continue.

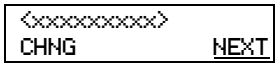
9 Press PARM.



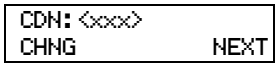
10 Press CHNG if you want to change the name of the skillset
or
press NEXT and go to step 11.



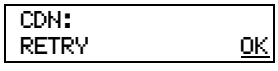
11 Enter the new skillset name and press OK.
For how to enter characters on the dialpad, see "Using the dialpad" on page 24.



12 Press NEXT.

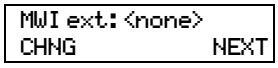


13 The skillset's CDN is displayed.
Press CHNG to change the CDN
or
press NEXT and go to step 14.

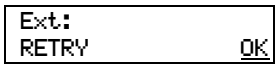


14 Enter the CDN and press OK.

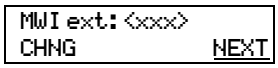
15 Press NEXT.



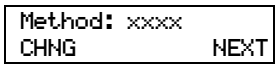
16 Press CHNG to assign or change an MWI ext
or
press NEXT to accept the default of no MWI and go to step 17.



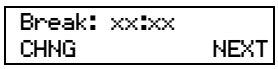
17 Enter the extension for MWI and press OK.



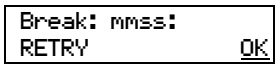
18 Press NEXT.



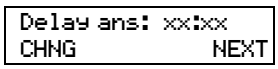
19 Press CHNG to change the method of call distribution
or
press NEXT.



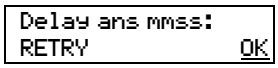
20 Press CHNG to change the Break time
or
press NEXT and go to step 21.



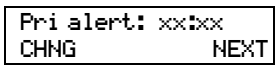
21 Enter the Break time and press OK.
This is a four digit field. Add a zero to any single digit hour or minute.



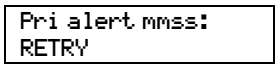
22 Press CHNG to change the Delay Answer time
or
press NEXT and go to step 24.



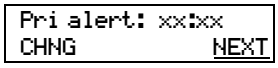
23 Enter the Delay answer time and press OK.
This is a four digit field. Add a zero to any single digit hour or minute.



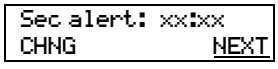
24 Press CHNG to set a Primary Alert time
or
press NEXT and go to step 25.



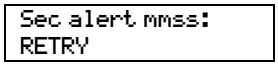
25 Enter the Primary Alert time.
This is a four digit field. Add a zero to any single digit hour or minute.



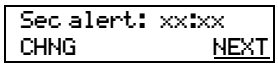
26 The display shows the Primary Alert time.
Press NEXT.



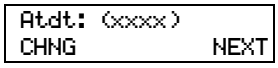
27 Press CHNG to set a Secondary Alert time
or
press NEXT and go to step 28.



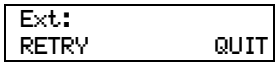
28 Enter the Secondary Alert time.
This is a four digit field. Add a zero to any single digit hour or minute.



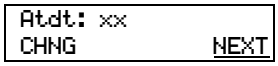
29 The display shows the Secondary Alert time.
Press NEXT.



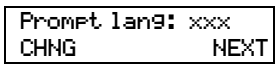
30 The display shows whether the skillset has an attendant extension assigned.
Press CHNG to change the attendant extension
or
press NEXT and go to step 33.



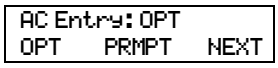
31 Enter the attendant extension.



32 Press NEXT.

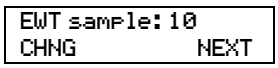


33 Press CHNG to change the prompt language
or
press NEXT.



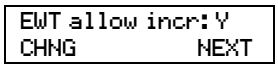
34 Press NEXT if your Contact Center does not use Activity Codes or if you do not want to change the Activity Code entry type and go to step 36
or
if your Contact Center uses Activity Codes, select the Activity Code entry type: OPT for Optional, PRMPT for Prompted and press NEXT.
This prompt appears only if you have Reporting for Contact Center enabled on your system.

NOTE: Although you can set this Activity Code parameter by telephone, you must use CallPilot Manager to create Activity Codes. For more information, see the *Intelligent Contact Center Set Up and Operation Guide* (NN40040-301) or CallPilot Manager online help.

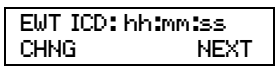


35 If you use Expected Wait Time, enter how many calls you want to use to calculate EWT. The range is 2-256 calls. The default is 10.

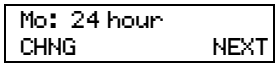
If you do not use Expected Wait Time, go so step 39.



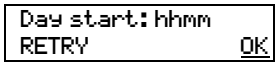
36 If you use Expected Wait Time, select whether you want EWT to be recalculated if it increases, and the appropriate EWT greeting to be played. The default is Y.
If you do not want to change this setting



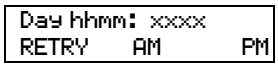
37 If you use Expected Wait Time, enter the Initial Call Duration. This can be a value between 00:01:00 and 24:00:00, and is used to compute expected wait time until sufficient statistics are obtained.



38 The display shows the Monday Routing Table method. In this example the Routing Table is in 24 hour mode. Press CHNG to change the Routing Table method
or
press NEXT and go to step 48.

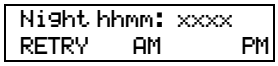


39 Enter the Day Routing Table start time and press OK. This is a four digit field. Add a zero to any single digit hour or minute.

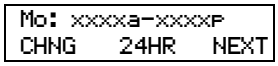


40 Press AM or PM.

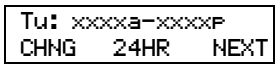
41 Enter the Night Routing Table start time and press OK. This is a four digit field. Add a zero to any single digit hour or minute.



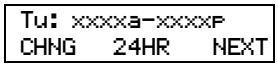
42 Press AM or PM.



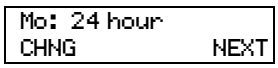
43 The display shows the Monday Routing Table start times. Press CHNG to change the start times and follow steps 40 through 43
or
press 24HR to use 24 hour service for Monday
or
press NEXT to continue.



44 The display shows the Tuesday Routing Table method. In this example the Routing Table has Day and Night Routing Table start times programmed.



45 Press CHNG to change Day or Night Routing Table start times
or
press 24HR to use 24 Hour mode for Tuesday
or
press NEXT to continue.



46 The display shows the Wednesday Routing Table method. Continue to change the Routing Tables start times for each day of the week.

47 Press ☎ to end the session.

Unconfiguring a skillset

If you unconfigure a skillset, you erase the programming for the skillset. You can then reprogram the skillset.

When you unconfigure a skillset, the system:

- erases the skillset Routing Table
- unassigns the skillset agents
- erases the skillset mailbox and all the messages in it
- makes the CDN available so it can be used by another skillset or device

To unconfigure a skillset:

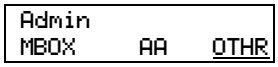
1 First disable the skillset and wait until all the calls are distributed. See "Disabling a skillset" on page 56.

2 Unassign the lines assigned to the skillset. See "To configure lines for Contact Center" on page 40.

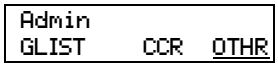
3 Follow the procedure below to unconfigure the skillset.

1 Press [⏻] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*

2 Enter the user password and press OK.

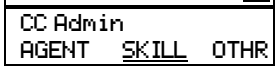


3 Press OTHR.

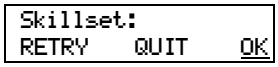


4 Press OTHR.

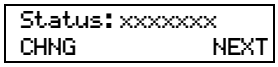
5 Press CC.



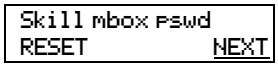
6 Press SKILL.



7 Enter the number of the skillset you want to change and press OK.



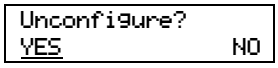
8 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable the skillset Press CHNG and press NEXT to continue.



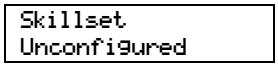
9 Press NEXT to continue.

10 Press OTHR.

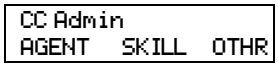
11 Press UNCF.



12 Press YES to unconfigure the skillset.



13 This display appears momentarily.



14 Press ☎ to end the session.

Chapter 6
Setting up skillset mailboxes

About skillset mailboxes

Each skillset has a mailbox that stores messages left by callers. A skillset mailbox is created automatically when you set up a skillset. There is one skillset mailbox for each skillset. The skillset mailbox number is the same as the Control Directory Number (CDN) of the skillset.

Skillset mailboxes have these Class of Service settings:

- use the primary prompt language
- maximum message time is 15 minutes
- maximum message length is three minutes
- maximum message retention is 30 days
- maximum greeting length of one minute
- Off-premise message notification enabled with a retry interval of five minutes and three attempts
- Outbound Transfer is disabled
- maximum number of incorrect password attempts is nine
- password expires in 90 days
- Networking is enabled if you have the Message Networking option enabled
- Personal Target Attendant is enabled
- Record Call is not enabled
- prompt language is Primary
- user interface is Norstar Voice Mail

The default Class of Service for skillset mailboxes is 1.

To prepare a skillset mailbox to receive messages:

- Know the skillset mailbox number (CDN) of each skillset mailbox.
  If you do not know the skillset mailbox number, see "Determining a skillset mailbox number" on page 66
- Initialize the skillset mailbox. Refer to "Initializing a skillset mailbox" on page 68.
- Record the skillset mailbox greetings. Refer to "Recording skillset mailbox greetings" on page 74.

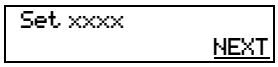
You can use the table "Skillset mailboxes" on page 204 to record the skillset mailboxes you set up.

Determining a skillset mailbox number

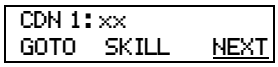
You must know a skillset mailbox number before you can set up the skillset mailbox. The skillset mailbox number is the mailbox's Control DN. If you know the skillset mailbox number, you can initialize the mailbox. Refer to "Initializing a skillset mailbox" on page 68.

To determine a skillset's mailbox number and Message Waiting Indication telephone

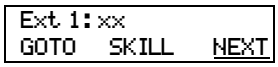
1 Press [Feature] 9 8 5.



2 Press NEXT.



3 The skillset mailbox number for skillset 1 is displayed.
If None appears the skillset is not configured.
Press NEXT to continue.



4 The Message Waiting Indication (MWI) extension is displayed.
If there are messages in the skillset 1 mailbox, MWI appears at this extension. You assign the MWI extension when you set up the skillset. If Unavail appears you have not set up an MWI extension.

5 Press NEXT to view the skillset mailbox number and MWI extension for the next skillset
or
press GOTO to view another skillset and enter the skillset number.

6 Press [End] to end the session.

While you use [Feature] 9 8 5 you can:

- press 1 for GOTO to enter the number of the skillset you want to monitor
- press 2 for SKILL to monitor the next enabled skillset
- press 3 or 6 for NEXT
- press 4 for PREV to go to previous menu
- press # to go to the next menu
- press * to cancel the session

Checking which telephone mailbox interface you use

CallPilot supports two interfaces: Norstar Voice Mail and CallPilot.
The Contact Center Administrator determines which interface is assigned to the mailbox.

To change your mailbox interface, see:

- the *CallPilot Manager Set Up and Operation Guide* for how to change your interface using CallPilot Manager
- the *CallPilot Telephone Administration Guide* for how to change your interface using a telephone

Follow the procedures that apply to the interface you use.
Some procedures apply to both interfaces.

To check which CallPilot interface you use

1. Press [ ] 9 8 1 .
   Follow the voice prompts or the display button options to open your mailbox.
2. Check the display to see which interface you use:

This is the Norstar Voice Mail interface.

This is the CallPilot interface.

3. Press [ ] to end the session.

Initializing a skillset mailbox

You must initialize a skillset mailbox before you can retrieve or listen to messages that are left in it, and before you can enable its skillset.

Choose a password for the skillset mailbox that is between four to eight digits long and does not start with zero. Give the skillset mailbox passwords to the agents who are responsible for retrieving messages.

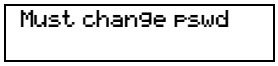
Initializing a skillset mailbox involves:

- choosing a password from four to eight digits long that does not start with zero
- changing the skillset mailbox default password to the new password
- recording the skillset mailbox name in the Company Directory

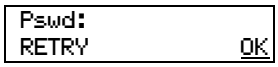
To initialize a skillset mailbox

1 Press [Feature] [9] [8] [1].

2 Log on by following the voice prompts.
Use the skillset mailbox number and [0] [0] [0] [0], the default password.



3 This display appears briefly to indicate that you must change the password.

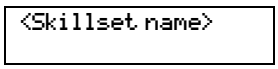


4 Enter a new skillset mailbox password from four to eight digits long that does not start with zero.
Press OK or [#].

5 Reenter the skillset mailbox password and press OK or [#].

6 At the tone, record the skillset mailbox name in the Company Directory. Do not use handsfree.
Include the skillset mailbox number in the recording, For example, "Sales, mailbox 5813."
Press OK or [#] to end the recording.

7 Press OK or [#] to accept the recording
or
press PLAY or [1] to listen to the recording
or
press RETRY or [2] to re-record your name.



8 The recorded name plays and the skillset mailbox name is displayed. The skillset mailbox name is the name you entered when you set up the skillset properties.

9 Press [End] to end the session.

Opening a skillset mailbox

You can open an initialized skillset mailbox from:

- your extension
- another extension
- an outside tone dial telephone

To open a skillset mailbox - Norstar Voice Mail

1. Press [Feature] 9 8 1.

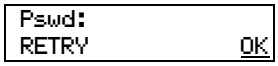
2. Enter the skillset mailbox password and press OK or #
   or
   if you are at another extension, or if you are using a Guest mailbox, press OTHR or * to display the Log: prompt. When this prompt appears, enter the skillset mailbox number and password.

3. After you open the skillset mailbox, the telephone display shows how many new and saved messages are in the mailbox.

To open a skillset mailbox - CallPilot

1. Press [Feature] 9 8 1.

2. Press #
   or
   if you are at another extension, enter the skillset mailbox number and then press OK or #.



3. Enter the skillset mailbox password and press OK or #.

Opening a skillset mailbox remotely

To open a skillset mailbox from an outside telephone

- If a skillset mailbox is a Mailbox node in a CCR Tree, enter the digits and you automatically transfer to the skillset mailbox

  or

- Call an Operator, receptionist or subscriber and ask them to transfer you to the skillset mailbox number using [9] [8] [6].
- After you reach the skillset mailbox, press [*] [*] during the greeting to open the skillset mailbox. If you are in Europe or Australia press [8] [8].
- At the voice prompt, enter the skillset mailbox number and password and press [#]. Follow the voice prompts.

To open a skillset mailbox directly from an outside telephone

Follow either procedure to open a skillset mailbox remotely.

1. Call a telephone line that is answered by the Automated Attendant.
2. Press [*] [*] during the Automated Attendant Menu prompt.
   If you are in Europe or Australia press [8] [8].
3. Enter the skillset mailbox number and password, and then press [#].
4. Follow the voice prompts.

or

1. Call your extension number.
2. Press [*] [*] during your personal greeting.
   If you are in Europe or Australia press [8] [8].
3. Enter the skillset mailbox number and password, and then press [#].
4. Follow the voice prompts.

Skillset mailbox password

To decrease the chances of unauthorized access to a skillset mailbox, change its password regularly, Nortel suggests every 30 days.

Keep a written copy of the skillset mailbox passwords in "Skillset mailboxes" on page 204. Give the skillset mailbox passwords only to the agents who retrieve messages at your contact center. For security reasons, choose an uncommon password, not a predictable password like 1234 or 1111. If someone knows a skillset mailbox password, they can access the skillset mailbox and play or delete messages. They can also access CallPilot and use it fraudulently or disrupt service.

Changing a skillset mailbox password

You can change a skillset mailbox password at any time. A password must be from four to eight digits long and cannot start with zero.

To change a skillset mailbox password

1 Press [Transfer] [9] [8] [1].
Follow the voice prompts or the display buttons to open the skillset mailbox.

<Skillset name>

2 The skillset mailbox name appears briefly and the recorded name plays.

3 If you use the CallPilot interface:

- Press [8] [4] to open the Mailbox Password menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press PSWD or [4]
- Go to step 4

Pswd:
RETRY OK

4 Enter your new mailbox password and press OK or [#].

Again:
RETRY OK

5 Re-enter your new mailbox password and press OK or [#].

Password OK

6 This display appears briefly.

7 Press [End] to end the session.

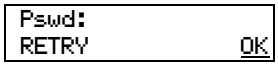
Resetting a skillset mailbox password

You must disable the skillset before you reset the password.

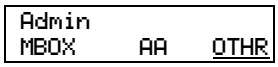
Note: Reset a password if the agent who accesses the skillset mailbox forgets the password or is "locked-out". The password for the reset mailbox is 0000. The agent who accesses the skillset mailbox cannot retrieve messages until they create a new password. Tell the agent to change the default password as soon as possible. While the skillset mailbox has the default password, the mailbox is vulnerable to unauthorized access.

To reset a skillset mailbox password

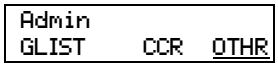
1 Press [✆] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



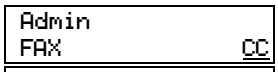
2 Enter the user password and press OK.



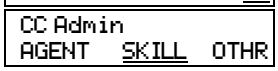
3 Press OTHR.



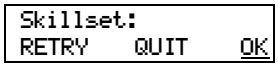
4 Press OTHR.



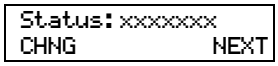
5 Press CC.



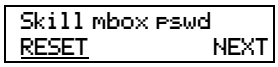
6 Press SKILL.



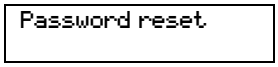
7 Enter the number of the skillset whose mailbox password you want to reset and press OK.



8 The display shows whether the skillset is enabled or disabled.
Press NEXT if the skillset is disabled
or
press CHNG and then press next if the skillset is enabled.



9 Press RESET to reset the password for the skillset mailbox.



10 This display appears briefly.

11 Press [☎] to end the session.

Recording skillset mailbox greetings

After you initialize a skillset mailbox, record the greetings for it.

You can record Primary, Alternate and Personalized greetings for each skillset mailbox. You record a Primary skillset mailbox greeting for everyday use. The Alternate skillset mailbox greeting is an optional greeting you can record for special circumstances. If your contact center subscribes to Caller ID, you can record Personalized skillset mailbox greetings.

If you record Primary and Alternate skillset mailbox greetings, you must choose which greeting plays to callers who reach the skillset mailbox.

You can also record greetings in an Alternate Language. Callers can press 9 while the greeting is playing to listen to the voice prompts in the Alternate Language. Remember to inform callers in the Primary skillset mailbox greeting that they can press 9 to hear the Alternate Language.

If the Operator Status is set to Yes, and a caller presses 0 during the skillset mailbox greeting, the caller transfers to the receptionist or Operator. For information about Operator Status, see the *CallPilot Manager Set Up and Operation Guide* (NN40090-300). Inform callers in the skillset mailbox greetings that they can press 0 to speak to the receptionist or Operator.

If the Operator Status is set to No, a caller who presses 0 during the skillset mailbox greeting is informed the Operator is not available, and is transferred to the skillset mailbox.

Examples of Primary and Alternate greetings

You must record a Primary greeting for each skillset mailbox. In the Primary greeting include the skillset mailbox name that is listed in the Company Directory. For example:

"*Hello. You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your name, telephone number and a brief message. One of our agents will return your call as soon as possible. Thank you.*"

You can record an Alternate greeting for each skillset mailbox. Use an Alternate greeting for special circumstances. In the Alternate skillset mailbox greeting include the skillset mailbox name that is listed in the Company Directory.

For example:

"*Season's Greetings! You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your name, telephone number and a brief message. One of our agents will return your call when we re-open on December 27. Thank you.*"

To record a Primary or Alternate skillset mailbox greeting

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

<Skillset name>

2 The skillset mailbox name appears briefly.

3 If you use the CallPilot interface:

- Press 8 2 to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press ADMIN or 8
- Press GREET or 2
- Go to step 4

Greeting options
REC CHOOSE CFWD

4 Press REC or 1.

Greeting:
PRIME ALT PERS

5 Press PRIME or 1 to record the Primary greeting
or
press ALT or 2 to record the Alternate greeting.
If you are changing a greeting, the current greeting starts to play.

Not recorded

6 If this is the first time you are recording a greeting, this display appears briefly.

Record new?
YES NO QUIT

7 Press YES or 1 and record your greeting at the tone.

Record greeting:
RETRY OK

8 Press OK or # to end the recording.

Accept greeting?
RETRY PLAY OK

9 Press OK or # to accept the recording
or
press PLAY or 1 to listen to the greeting
or
press RETRY or 2 to rerecord the greeting.

10 Press [ ] to end the session.

Choosing a Primary or Alternate skillset mailbox greeting

If you record a Primary and an Alternate skillset mailbox greeting, you must choose which greeting plays. You can change the selection at any time and as often as needed. If you do not choose a greeting, the Primary skillset mailbox greeting plays.

If you choose the Alternate mailbox greeting, you must set whether the mailbox accepts messages. If you choose Yes the skillset mailbox receives messages in the normal way.

If you choose No:

- messages cannot be left in the skillset mailbox
- the Alternate mailbox greeting takes precedence over all other greetings
- if a caller presses a button to fast forward the message, they hear a voice prompt that says this is a special greeting
- if a caller presses a button to send a fax, the fax goes to the General Delivery Mailbox, not the skillset mailbox.

If you choose the Alternate mailbox greeting, remember to change back to the Primary mailbox greeting at the appropriate time.

To choose a Primary or Alternate skillset mailbox greeting

1 Press [Transfer] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

```
<Skillset name>
```

2 The skillset mailbox name appears briefly.

3 If you use the CallPilot interface:

- Press [8] [2] to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

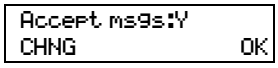
- Press ADMIN or [8]
- Press GREET or [2]
- Go to step 4

```
Greeting options
REC   CHOOSE   CFWD
```

4 Press CHOOSE or [2] to select a greeting.

```
Use greeting:
PRIME   ALT    QUIT
```

5 Press PRIME or [1] to select the Primary mailbox greeting and go to step 7
or
press ALT or [2] to select the Alternate mailbox greeting and go to step 6.



6 If you choose the Alternate mailbox greeting, you are asked whether the mailbox can accept messages.
Press CHNG or 1 to toggle from yes to no
or
press OK or # to accept.

7 Press ☎ to end the session.

Recording a Personalized skillset mailbox greeting

If your contact center subscribes to Caller ID, you can record a maximum of three Personalized greetings for each skillset mailbox. For Personalized skillset mailbox greetings, you program Contact Center to recognize a specific telephone number. The Personalized skillset mailbox greeting plays only for a call from the specific telephone number.

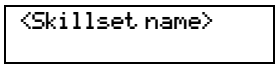
If you record a Personalized greeting, program the skillset mailbox to receive messages and choose an Alternate mailbox greeting, the Personalized greeting takes precedence over any other greetings. If you program the skillset mailbox not to receive messages and choose an Alternate mailbox greeting, the Alternate mailbox greeting takes precedence over any other greeting, including Personalized mailbox greetings.

In the Personalized skillset mailbox greeting include the skillset mailbox name that is listed in the Company Directory. For example:

"*Hi John. You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your order. One of our agents will return your call if you need to speak to someone directly. Thank you.*"

To record a Personalized skillset mailbox greeting

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone, to open the skillset mailbox.



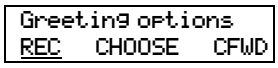
2 The skillset mailbox name appears briefly.

3 If you use the CallPilot interface:

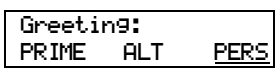
- Press 8 2 to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

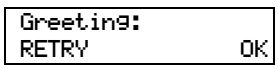
- Press ADMIN or 8
- Press GREET or 2
- Go to step 4



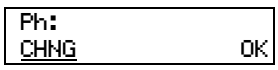
4 Press REC or 1.



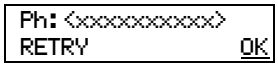
5 Press PERS or 3 to record a Personalized greeting.



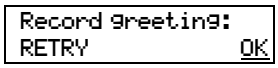
6 Enter a Personalized greeting number of 1, 2 or 3.



7 Press CHNG or 1.



8 Enter the telephone number (maximum 10 digits) that you are assigning the Personalized mailbox greeting to.
Press OK or # to accept the telephone number.



9 Lift your handset.
At the tone, record your greeting.
Press OK or # to end the recording.

10 Press OK or # to accept the greeting,
or
press PLAY or 1 to listen to the greeting
or
press RETRY or 2 to re-record the greeting.

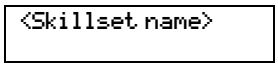
11 Press ☎ to end the session.

Deleting a Personalized mailbox greeting

If you no longer need a Personalized mailbox greeting, you can delete it.

To delete a Personalized mailbox greeting

1 Press [Menu] 9 8 1.
Follow the voice prompts or the display button options on your telephone, to open the skillset mailbox.



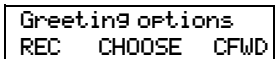
2 The skillset mailbox name appears briefly.

3 If you use the CallPilot interface:

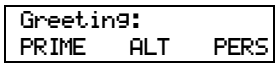
- Press 8 2 to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

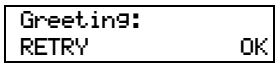
- Press ADMIN or 8
- Press GREET or 2
- Go to step 4



4 Press REC or 1.



5 Press PERS or 3 to choose a Personalized mailbox greeting.



6 Enter the Personalized greeting number that you want to delete.

7 Press DEL or 2 to delete the greeting.

8 Press [End] to end the session.

Checking skillset mailboxes for messages

Frequently check the skillset mailboxes for messages. Only one agent can retrieve messages from each skillset mailbox at a time.

If different agents access the messages in the skillset mailbox throughout the day, each agent should:

- listen to the message
- write down what the message says
- erase the message
- return the caller's telephone call

If the caller is not available, the agent can try again later or pass the message on to another agent.

If the agent who listens to the message erases the message after writing down what it says:

- the next agent does not waste time listening to the same message
- the next agent knows if the callback was successful or not
- only one agent contacts the caller

If only one agent is responsible for retrieving messages at your contact center, this agent does not need to transcribe and delete each message before callback. This agent handles messages and knows the status of the old messages.

Playing skillset mailbox messages

Use the procedure for playing messages that corresponds to the interface you use:

- "To play skillset mailbox messages - Norstar Voice Mail" on page 82
- "To play skillset mailbox messages - CallPilot" on page 84

To play skillset mailbox messages - Norstar Voice Mail

Use this procedure if you use the Norstar Voice Mail interface.

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

2 Press PLAY or 2 to listen to your messages.
For other options, see the table "Playing skillset mailbox messages - Norstar Voice Mail" on page 82.

3 Press [ ] to end the session.

The table "Playing skillset mailbox messages - Norstar Voice Mail" shows the message options available to you during and after playing messages.

Playing skillset mailbox messages - Norstar Voice Mail

Option	Button	Available while playing	Available after playing	Description
Back up	1 or < <<	4		Rewinds the message three seconds and resumes playing it.
Copy	5 or COPY	4	4	Sends a copy of the message to one or more mailboxes. If you record an introduction, it must be longer than three seconds.
End of Message	3 3 or >>> >>>	4		Goes to the end of the message.
Envelope	7	4	4	Plays the information in the message envelope. Envelope information includes the date and time the message was sent and, if the message is internal, the directory name of the sender.
Erase	8 or ERASE	4	4	Deletes the message currently playing. If no messages are playing, deletes the last message played. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes 1 and 2 on page 83.)

Playing skillset mailbox messages - Norstar Voice Mail				
Option	**Button**	**Available while playing**	**Available after playing**	**Description**
Forward	3 or > >>	4		Advances the message three seconds and continues playing from that point.
Next	6 or # #	4	4	Plays the next message in the skillset mailbox. If you use this while a message is playing, it stops playing the current message and plays the next message in the skillset mailbox.
Pause/ Continue	2 or STOP/ PLAY	4		Temporarily stops a message. When you stop the message, you can play the previous message, continue playing the current message, or skip to the next message.
Previous	4	4	4	Stops playing the current message and plays the previous message.
Quit	*		4	Stops playing the message and plays the Mailbox main menu options.
Replay	1 1 or < << < <<	4		Replays the message from the beginning.
Replay	1		4	Replays the last message.
Reply	9 or REPLY	4	4	Replies to a message. (Refer to Note 3 on page 84) The reply can be either: - a message to an internal sender's mailbox - a telephone call to an internal or external party (Refer to Note 4 on page 84.)
Save Message	7 7 or SAVE	4		Saves the message being played. (If you do not delete a message, it is automatically saved). This option is not shown on the display unless you erase a message. If you erase a message and play the message again, you can press SAVE on a two line display telephone. (Refer to Note 2 on page 83.)
Volume Control	*	4		Adjusts the volume of the message that is playing. The volume increases each time you press *. After four presses, the volume returns to the lowest level.

Notes:

1 Because the skillset mailbox has limited message storage space, delete any messages you no longer need. After a certain time period, your saved messages are erased automatically. Ask your System Administrator about this.

2 You can retrieve a deleted message only if you have not quit the session in which you deleted it. For information about retrieving deleted messages, see "Retrieving erased messages" on page 85".

3 Applies only if the Reply feature is enabled.

4 You can reply to an outside caller by dialing them back if your company subscribes to Caller ID (CLID) service. For more information about replying to an outside caller, see "Using the Reply feature to reply to an external caller" on page 88.

To play skillset mailbox messages - CallPilot

Use this procedure if you use the CallPilot interface.

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

A voice prompt announces the number of new and saved messages that you have.

2 You can play any message that you want to listen to.
Press 2 to play the current message.
For other message commands, see the table "Playing skillset mailbox messages - CallPilot".

3 Press [ ] to end the session.

The table "Playing skillset mailbox messages - CallPilot" shows the message options that are available to you during and after playing messages.

Playing skillset mailbox messages - CallPilot

Option	Button	Available during and after playing	Description
Skip Back	1	4	Rewinds the message five seconds and resumes playing it at that point.
Skip Forward	3	4	Advances the message five seconds and continues playing from that point.
Previous Message	4	4	Stops playing the current message and plays the previous message.
Next Message	6	4	Plays the next message in the skillset mailbox. If you use this while a message is playing, it stops playing the current message and plays the next message in the skillset mailbox.
Call Sender	9	4	Places a call to the sender of a message.
Help	*	4	Offers a Help menu.
Reply	7 1	4	Replies to a message.

Playing skillset mailbox messages - CallPilot			
Option	**Button**	**Available during and after playing**	**Description**
Envelope	7 2	4	Plays the information in the message envelope. Envelope information includes the date and time the message was sent and, if the message is internal, the directory name of the sender.
Forward Message	7 3	4	Forwards the message to one or more mailboxes. You can record an introduction to the forwarded message.
Reply All	7 4	4	Replies to a message and all recipients of the message. (Refer to Note 3 on page 84.)
Delete	7 6	4	Deletes the current message. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes1 and 2 on page 83.)

Retrieving erased messages

After you play your messages and end your skillset mailbox session, any messages that you do not erase are saved. Since message storage space is limited, we recommend that you erase messages that are no longer needed.

You can retrieve an erased message if you are still in the skillset mailbox session. An erased message remains in the skillset mailbox until you end the current session.

To retrieve an erased message - Norstar Voice Mail

After you erase a new or saved message, the number of new or saved messages shown on the display is decreased by one. Even though the display shows 0 new 0 saved, you can still play and retrieve any erased skillset mailbox messages. Press PLAY or 2 to listen to the erased message.

To retrieve an erased message - CallPilot

You can retrieve a deleted message. A deleted message remains in the skillset mailbox until you end the current session. Locate the deleted message. Then press 7 6 to restore the message.

After you play the erased message, you can restore it. If you end the current session without restoring the erased message, it is permanently erased from the skillset mailbox.

Replying to messages

You can reply to internal and external callers. You can reply to an external caller if your company subscribes to CLID.

The messages you record must be longer than three seconds. The system times out after five seconds of silence.

Use the procedure for replying to messages that applies to the interface you use:

- "To reply to an internal caller - Norstar Voice Mail" on page 86
- "To reply to an internal caller - CallPilot" on page 87

Replying to an internal caller

If you use	and you want to	use
Norstar Voice Mail	reply to the caller's extension	CALL to transfer to the internal caller's extension.
	leave a message in the caller's mailbox	MSG to record and send a reply to the internal caller's mailbox.
CallPilot	reply to the caller's extension	Call Sender 9 to transfer to the internal caller's extension.
	leave a message in the caller's mailbox	Reply 7 1 to record and send a reply to the internal caller's mailbox.

To reply to an internal caller - Norstar Voice Mail

1 Press * 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

```
1 new  0 saved
PLAY    REC    ADMIN
```

2 Press PLAY or 2.

```
End of message
REPLY   ERASE  NEXT
```

3 After you listen to the message, press REPLY or 9.

```
Reply to msg
MSG     CALL   QUIT
```

4 Press CALL or 2 to call the caller
or
press MSG or 1 to record and send a reply.

To reply to an internal caller - CallPilot

1 Press [Transfer] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

2 A mailbox summary is announced.
While you are in your message list, you can play any message.

3 Press [2] to play the current message.

4 Press [9] to call the caller
or
press [7] [1] to record and send a reply.

Using the Reply feature to reply to an external caller

You can reply to an external caller using the Reply feature if your company subscribes to a Caller ID service and the skillset mailbox has an outdial method assigned to it. To assign an outdial method to a skillset mailbox, see "Assigning an outdial method to a skillset mailbox" on page 90. Before you use the Reply feature you must play the message.

To reply to an external caller - Norstar Voice Mail

1 Press [✆] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 Press PLAY or [2].

3 After you listen to the message, press REPLY or [9].
CallPilot dials the external number directly.

To reply to an external caller - CallPilot

1 Press [✆] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 A mailbox summary is announced.
While you are in the message list you can play any message.

3 Press [2] to play the current message.

4 Press [9] to call the caller.
CallPilot dials the external number directly.

Chapter 7
Off-premise Message Notification

About Off-premise Message Notification

Off-premise Message Notification notifies you or a designated agent when there are new or urgent messages in a skillset mailbox. You can receive Off-premise Message Notification at any tone dial telephone number, pager or extension.

Note: Set up Off-premise Message Notification for non-business hours. Then Off-Premise Message Notification does not consume a Reserved or voice channel during busy periods.

You can receive notification of a message at a maximum of five different destination numbers. When the number of retry attempts is reached for each destination number, the next number in the series is called. For example, Contact Center can call your car telephone first when there is a message in the skillset mailbox. If there is no answer, Contact Center waits five minutes and calls your car telephone again. If there is still no answer, Contact Center calls your car telephone a third time. If there is no answer after three calls, Contact Center calls your home telephone. Contact Center continues to call at five minute intervals until the call is answered or all of the destinations are called three times.

Off-premise Message Notification, the Retry Intervals and Maximum Number of Attempts for skillset mailboxes are assigned through the Class of Service settings in CallPilot Manager. Skillset mailboxes have a default Class of Service of 1.

Class of Service 1 has these default settings for Off-premise Message Notification:

- Off-premise Message Notification enabled
- a Retry Interval of five minutes
- a Maximum Number of Attempts of 3

For information about changing Class of Service settings, see the *CallPilot Manager Set Up and Operation Guide* (NN40090-300).

You must assign start and stop times for telephone and destinations. Off-premise Message Notification begins when the start time is reached. Set the start time for a time when you are at the destination number so that you are there to receive calls.

A person who receives an Off-premise Message Notification call can cancel Off-premise Message Notification to their destination number. This is useful if a destination is incorrectly programmed and a wrong party receives the calls.

The recipient of an Off-premise Message Notification call hears the following voice prompt: "*Message for (name of mailbox owner). To log on press* 1. *If you have received this call by mistake, please press* 2.

After you set the Off-premise Message Notification parameters, Off-premise Message Notification is enabled automatically.

Assigning an outdial method to a skillset mailbox

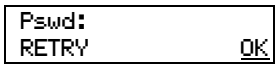
The outdial method determines which line, line pool or route code the system uses for Off-premise Message Notification. The default for outdial method is None. You must assign an outdial method before you can use an external telephone or a pager as an Off-premise Message Notification destination.

For more information about line pools and route codes, see your system documentation.

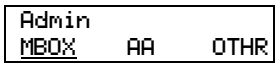
Warning: Do not change the extension number assigned to the skillset mailbox. If this extension number is changed, callers in the skillset cannot access the skillset mailbox and you cannot change the Skillset general parameters. To correct a wrong extension number, change the extension number to the Control DN of the skillset.

To assign an outdial method to a skillset mailbox

1 Press [Transfer] 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*

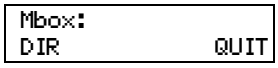


2 Enter the user password and press OK.

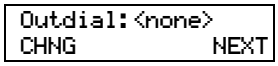


3 Press MBOX.

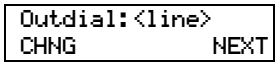
4 Press CHNG.



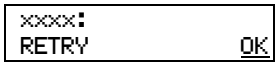
5 Enter the skillset mailbox number or press DIR to use the Company Directory.



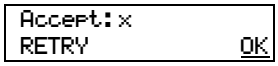
6 Press NEXT until you see this display.
Press CHNG.



7 Press NEXT if you want to use a line as the outdial method
or
press CHNG if you want to use a line pool as the outdial method and then press NEXT.



8 Enter the Line or Pool number and press OK.
Line numbers must be between 1 and 500. Although line pools have a letter such as A, B or C, Contact Center accepts only numbers. If you enter a line pool use 1 for A, 2 for B, 3 for C, and so on.



9 Press OK.

10 Press [End] to end the session.

Off-premise Message Notification parameters

You can set up the parameters for Off-premise Message Notification from any tone dial telephone.

The parameters are:

- destination type (phone, extension or pager)
- destination number (phone, extension or pager)
- time range for receiving calls at telephone numbers or extensions (Pagers are notified any time there is a qualifying message.)

- types of message you want to receive (all new messages or just urgent messages)

Note: The restrictions that apply to your telephone line also apply to Off-premise Message Notification numbers. For example, if you cannot dial long distance telephone numbers from your telephone, you cannot have a long distance Off-premise Message Notification destination number.

Setting up Off-premise Message Notification

Follow these instructions if you have not set up Off-Premise Message Notification and are setting it up for the first time. If you have set up Off-Premise Message Notification, see the section on "Changing Off-premise Message Notification" on page 102.

To set up Off-premise Message Notification to	see
a telephone number	page 93
an extension	page 95
a pager	page 97

To set up Off-premise Message Notification to a telephone number

1 Press [Feature] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

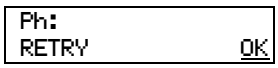
- Press 8 5 to open the Mailbox Tools
- Press NOTIF or 2 to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

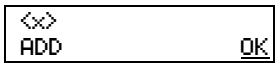
- Press ADMIN or 8
- Press 6 to open the Off-premise Message Notification menu
- Go to step 3

3 Press ADMIN or 1 to set up Off-premise Message Notification.

4 Press PHONE or 1 to choose a telephone number destination.

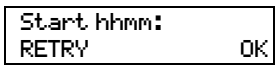


5 Enter the destination telephone number and press OK or #. The destination telephone number is a maximum of 30 digits.

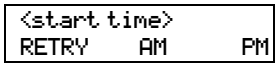


6 Press OK or # to accept the destination telephone number represented by <x>
or
press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

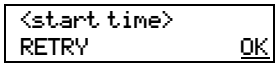
After you add special characters, press OK or # to accept the destination number.



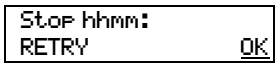
7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by a zero.



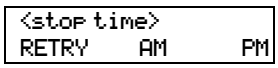
8 Press AM or 1
or
PM or 2.



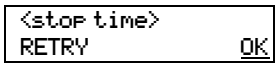
9 Press OK or # to accept the start time.



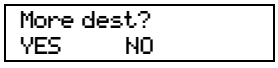
10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single-digit hour and minute must be preceded by a zero.



11 Press AM or 1
or
PM or 2.

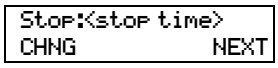


12 Press OK or # to accept the stop time.

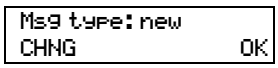


13 Press YES or 1 if you want to set up another destination number
or
press NO or # if you do not want to set up another destination number.

14 Press NEXT or # to accept the start time that you entered
or
press CHNG or 1 to change the start time.



15 Press NEXT or # to accept the stop time that you entered
or
press CHNG or 1 to change the stop time.



16 Press OK or # if you want to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.

17 Press ☎ to end the session.

To set up Off-premise Message Notification to an extension

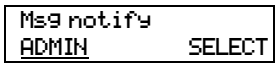
1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

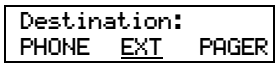
- Press 8 5 to open the Mailbox Tools
- Press NOTIF or 2 to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

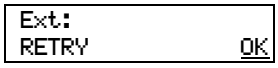
- Press ADMIN or 8
- Press 6 to open the Off-premise Message Notification menu
- Go to step 3



3 Press ADMIN or 1 to set up Off-premise Message Notification.

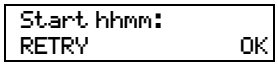


4 Press EXT or 2 to choose an extension as the destination.

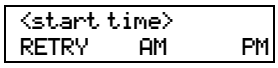


5 Enter the destination number and press OK or #.

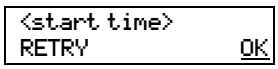
6 Press OK or # to accept the destination extension.
The <x> represents the extension.



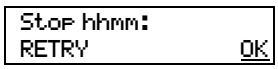
7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by zero.



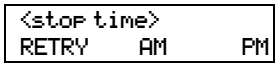
8 Press AM or 1
or
PM or 2.



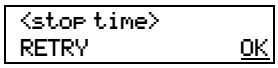
9 Press OK or # to accept the start time.



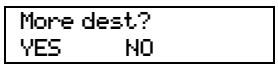
10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single-digit hour and minute must be preceded by a zero.



11 Press AM or 1
or
PM or 2.

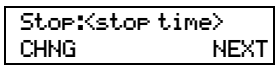


12 Press OK or # to accept the stop time.

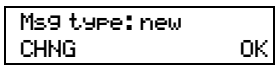


13 Press YES or 1 if you want to set up another destination number
or
press NO or # if you do not want to set up another destination number.

14 Press NEXT or # to accept the start time that you entered
or
press CHNG or 1 to change the start time.



15 Press NEXT or # to accept the stop time that you entered
or
press CHNG or 1 to change the stop time.



16 Press OK or # if you want to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.

17 Press ☎ to end the session.

About setting up Off-premise Message Notification to a pager number

Example of a destination pager number

If you are assigning a pager destination number from behind a PBX, remember to insert a 9 (depending on your system) before the # to access an outside line.

There is a combined limit of 30 characters for the pager telephone number and the pager message.

For example, to reach your pager, enter:

4 2 5 5 5 1 2 3 4 # 3

where:

- # specifies the next digits are special characters
- 4 recognizes dial tone
- 2 specifies that the next digits are the numbers to be dialed
- 5 5 5 1 2 3 4 is the pager telephone number dialed
- 3 inserts a timed pause

Depending on the company supplying your paging service, the programming sequence can vary. For more information about setting the destination telephone number parameters for your pager, contact your pager company.

To set up Off-premise Message Notification to a pager

1 Press ✆ 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

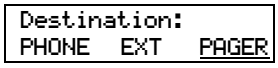
- Press 8 5 to open the Mailbox Tools
- Press NOTIF or 2 to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

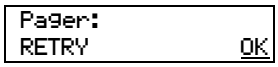
- Press ADMIN or 8
- Press 6 to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN  SELECT
```

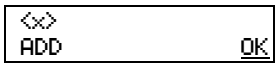
3 Press ADMIN or 1 to set up Off-premise Message Notification.



4 Press PAGER or 3 to select a pager number destination.

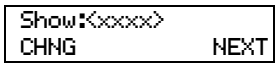


5 Enter the destination pager number and press OK or #.

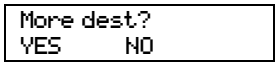


6 Press OK or # to accept the destination pager number represented by <x>
or
press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

After you add special characters, press OK or #.



7 Press NEXT or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you
or
press CHNG or 1 to change the pager message.
The combined limit is 30 characters for the pager telephone number and the pager message.



8 Press YES or 1 if you want to set up another destination number
or
press NO or # if you do not want to set up another destination number.

9 Press OK or # to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 to change the message type to be notified only when the skillset mailbox receives an urgent message.

10 Press ☎ to end the session.

To set up Off-premise Message Notification to more than one destination

You can receive notification of a message at a maximum of five different destination numbers. The following steps show you how to enter a telephone number destination and then add a pager destination for the first time.

1 Press [Menu] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

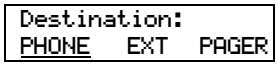
2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

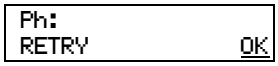
If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

3 Press ADMIN or [1] to set up Off-premise Message Notification.

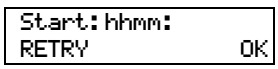


4 Press PHONE or [1] to choose a destination telephone number.



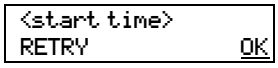
5 Enter the destination telephone number and press OK or [#]. The destination telephone number cannot be longer than 30 digits.

6 Press OK or [#] to accept the destination telephone number, represented by <x>
or
press ADD or [2] to add special characters and use your dialpad or follow the voice prompts to add characters.

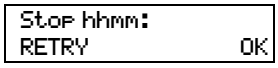


7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by a zero.

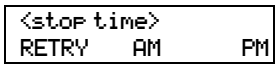
8 Press AM or [1]
or
PM or [2].



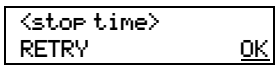
9 Press OK or # to accept the start time.



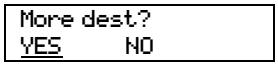
10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single digit hour and minute must be preceded by a zero.



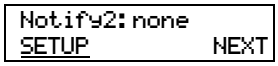
11 Press AM or 1
or
PM or 2.



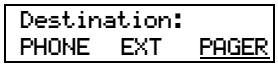
12 Press OK or # to accept the stop time.



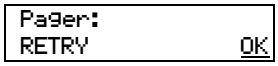
13 Press YES or 1 to set up another destination number.



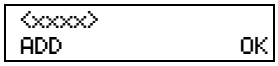
14 Press SETUP to set up another destination number.



15 Press PAGER or 3 to select a pager number destination.

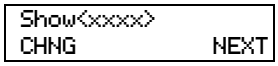


16 Enter the destination pager number and press OK or #.

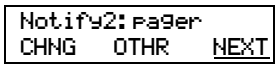


17 Press OK or # to accept the destination pager number represented by <x>
or
press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

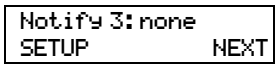
After you add special characters, press OK or #.



18 Press NEXT or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you
or
press CHNG or 1 to change the pager message.
The combined limit is 30 characters for the pager telephone number and the pager message.

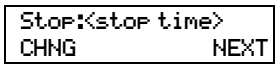


19 The display shows that the second destination is a pager. Press NEXT or # to continue.

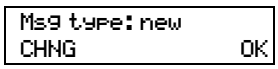


20 Press NEXT or # to continue
or
press SETUP to add another destination.

21 Press NEXT or # to accept the start time that you entered
or
press CHNG or 1 to change the start time.



22 Press NEXT or # to accept the stop time that you entered
or
press CHNG or 1 to change the stop time.



23 Press OK or # to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 to be notified only when the skillset mailbox receives an urgent message.

24 Press ☎ to end the session.

Changing Off-premise Message Notification

You can change the parameters and destinations for Off-Premise Message Notification. Refer to "Off-premise Message Notification parameters" on page 91 for more information about parameters.

If you want to change the time or message type parameters, use the procedure "To change the time range or type of message parameters" on page 102

If you want to change the destination type, see the procedure for the destination type.

To change the destination type	see
from a telephone to an extension, pager or another telephone number	page 104
from a pager to an extension or telephone	page 106
from a telephone or extension to a pager	page 108

To change the time range or type of message parameters

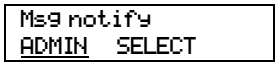
1 Press [✆] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

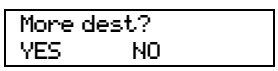
If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3



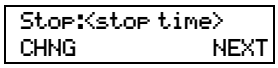
3 Press ADMIN or [1] to set up Off-premise Message Notification.

4 Press NEXT.
If you want to change the destination type, see "To change the destination type" on page 102 for the appropriate procedure.

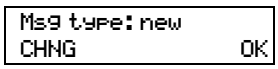


5 Press NO or [#] to continue.

6 Press CHNG or 1 to change the start time
or
press NEXT or # to accept the start time.



7 Press CHNG or 1 to change the stop time
or
press NEXT or # to accept the stop time.



8 Press CHNG or 1 to change the message type to urgent.
Press OK or # to accept the new default message. You can choose to be notified of all new messages or urgent messages only. Change the message type to urgent to be notified only when the skillset mailbox receives an urgent message.

9 Press ☎ to end the session.

To change the destination from telephone to another destination

1 Press [Feature] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

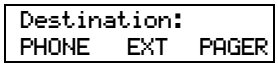
- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

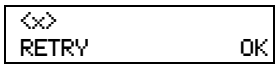
- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

3 Press ADMIN or [1] to set up Off-premise Message Notification.

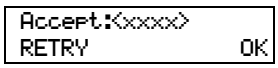
4 Press CHNG or [1] to change the destination.



5 Press PHONE or [1] to choose another telephone number destination
or
press EXT or [2] to choose an extension destination
or
press PAGER or [3] to choose a pager number destination.

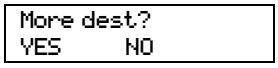


6 Enter the destination number and press OK or [#].
The destination telephone number cannot be longer than 30 digits.

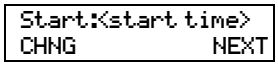


7 Press OK or [#] to accept the destination number
or
press RETRY or [*] to re-enter the destination number.

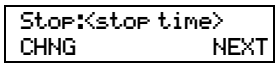
8 Press NEXT or [#] to continue
or
press CHNG or [1] to change the destination, and repeat steps 6 through 8.



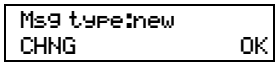
9 Press YES or 1 if you want to set up another destination number
or
press NO or # if you do not want to set up another destination number.



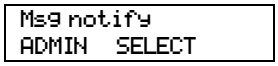
10 Press CHNG or 1 to change the start time
or
press NEXT or # to accept the start time.



11 Press CHNG or 1 to change the stop time
or
press NEXT or # to accept the stop time.



12 If you want to change message notification,
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.
Press OK or #.



13 Press ☎ to end the session.

To change the destination from pager to telephone or extension

1 Press [Feature] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

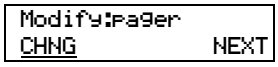
2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

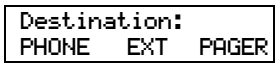
If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

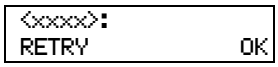
3 Press ADMIN or [1] to change Off-premise Message Notification. The displays shows the first destination type and destination number.



4 Press CHNG or [1] to change the destination type and the destination number.

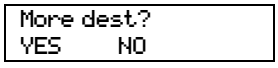


5 Choose the type of destination number:
press PHONE or [1] to choose a telephone number destination
or
press EXT or [2] to choose an extension destination.



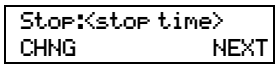
6 Enter the destination number you want to set up Off-Premise Message Notification for.
<x> represents the destination number.
Press OK or [#] to accept the destination number
or
press RETRY or [*] to re-enter the number.

7 Press NEXT or [#] to continue.



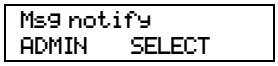
8 Press YES or [1] if you want to set up another destination, and repeat steps 6 through 8
or
press NO or [#] if you do not want to set up another destination.

9 Press CHNG or 1 to change the start time
or
press NEXT or # to accept the start time.



10 Press CHNG or 1 to change the stop time
or
press NEXT or # to accept the stop time.

11 If you want to change message notification,
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.
Press OK or # .



12 Press ☎ to end the session.

To change the destination from telephone or extension to pager

1 Press [Feature] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

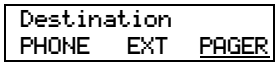
- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

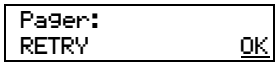
- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

3 Press ADMIN or [1] to change Off-premise Message Notification.
The displays show a review of the first destination type and destination number.

4 Press CHNG or [1] to change the destination type and the destination number.
<x> represents the type of destination (phone or extension).



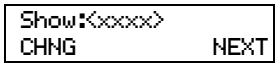
5 Press PAGER or [3] to choose a pager number destination.



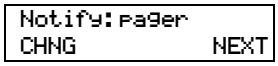
6 Enter the pager number and press OK or [#] to continue.

7 Press OK or [#] to accept the destination pager number represented by <x>
or
press ADD or [2] to add special characters and use your dialpad or follow the voice prompts to add characters.

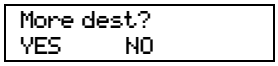
After you add special characters, press OK or [#].



8 Press NEXT or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you
or
press CHNG or 1 to change the pager message.
The combined limit is 30 characters for the pager telephone number and the pager message.



9 The display shows notification is set up to a pager.
Press NEXT or # to continue.



10 Press YES if you want to set up another destination number
or
press NO if you do not want to set up another destination number.

11 Press OK or # if you want to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.

12 Press ☎ to end the session.

Deleting a destination number

If you have more than one destination number for Off-premise Message Notification, you can delete a destination.

To delete a destination number

1 Press [Menu] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN  SELECT
```

3 Press ADMIN or [1] to set up Off-premise Message Notification.

```
Notify1:<x>
CHNG   OTHR   NEXT
```

4 Press OTHR if you want to delete the first destination
or
press NEXT or [#] to view the other destinations until you find the destination that you want to delete. When you find the destination that you want to delete, press OTHR.

```
Notify 1:<x>
DEL    INS    QUIT
```

5 Press DEL to delete the first destination number.

```
Notify1:<x>
CHNG   OTHR   NEXT
```

6 The first destination number is deleted. The Notify 2 destination changes to become the Notify 1 destination number.
To delete more destination numbers, press OTHR and repeat steps 4 and 5.

```
Msg notify
ADMIN  SELECT
```

7 Press [End] to end the session.

Adding a destination number

Use this procedure if you have set up Off-premise Message Notification and you want to add another destination number. You can have up to five destination numbers.

To add a destination number

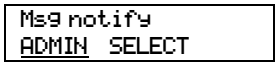
1 Press [Feature] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

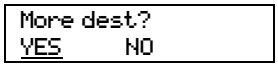
If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

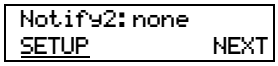


3 Press ADMIN or [1] to set up Off-premise Message Notification.

4 Press NEXT or [#] to continue.



5 Press YES or [1] to set up another destination number.



6 Press SETUP or [1] to set up another destination number and follow the steps in "To set up Off-premise Message Notification to a telephone number" on page 93
or
"To set up Off-premise Message Notification to an extension" on page 95
or
"To set up Off-premise Message Notification to a pager" on page 97.

Turning Off-premise Message Notification on or off

You can turn Off-premise Message Notification on or off at any time. If you turn Off-premise Message Notification off, you do not affect any of the assigned parameters.

To turn Off-premise Message Notification on or off

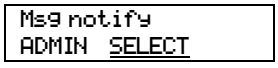
1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

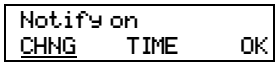
- Press 8 5 to open the Mailbox Tools
- Press NOTIF or 2 to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

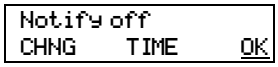
- Press ADMIN or 8
- Press 6 to open the Off-premise Message Notification menu
- Go to step 3



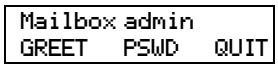
3 Press SELECT or 2 to set up Off-premise Message Notification.



4 Press CHNG or 1 to turn Off-premise Message Notification off if it is on (as shown).



5 Press OK or *
or
press TIME to review the start and stop time parameters.



6 Press [ ] to end the session.

Chapter 8
Setting up agents

Agents handle the calls in your contact center. Supervisors are agents with additional capabilities. Supervisors can monitor calls between agents and callers. You can record your agent programming in the table "Contact Center agents" on page 202.

About adding agents

The maximum number of configured agents depends on the BCM system you use. For capacities see, "Contact Center Update" on page 13.

Active agents are agents who are logged in to one skillset or a combination of skillsets. For example: If Agent 1 is logged in to skillset 1, then it is one active agent. If Agent 1 is logged in to skillset 1 and skillset 2, then there is one active agent. If Agent 1 and Agent 2 are logged in to skillset 1, then there are 2 active agents. If Agent 1, Agent 2, and Agent 3 are logged in to skillset 1, then there are three active agents.

For more information about Contact Center agents, see the *Intelligent Contact Center Agent Guide* (NN40040-101).

Agent properties

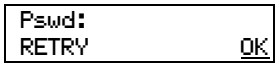
Agent ID	Each agent is assigned a unique ID number. Contact Center assigns the lowest available ID number, but you can assign a different number when you add the agent. Statistics are collected and reported for each ID number. For more information about statistics, see the *Reporting for Contact Center Setup and Operations Guide.*
Name	The agent name can be a maximum of 13 characters. If you do not enter a name, a default agent name appears as the word *Agent* and the ID number, for example, *Agent12*.
Supervisor	Super indicates that an agent has supervisor status. A supervisor is an agent with supervisor status. A supervisor has additional capabilities, such as the ability to monitor calls between agents and callers. Supervisors can monitor incoming calls only. Supervisors cannot monitor outgoing calls.
Automatic answer	Automatic Answer is optional. Select Automatic Answer if you want to force-deliver calls to an agent. If Automatic Answer is enabled, the agent hears a tone that indicates that a call is delivered. The agent is automatically in the handsfree mode. It is important that agents use the Not Ready feature when they are not available to receive calls. If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must answer calls manually.

Missed Call Option	The Missed Call Option controls how a call is treated if an agent does not answer the call. Busy assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Logout automatically logs an agent out of their skillset if they do not answer a call. The default is Busy, which returns the call to the skillset.
Activity Codes	Activity Code entry types are Prompted and Optional. Optional is the default. If you select Optional, an Activity Code session is not automatically displayed on the agent's telephone, but they can press F907 and enter Activity Codes. If you select Prompted, the agent is prompted to enter Activity Codes on their telephone. If you do not have Reporting for Contact Center enabled on your system, this setting does not appear.

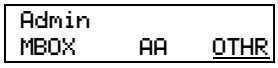
In addition to these agent properties, you can assign agents Dynamic Priority when you assign them to a skillset. Refer to "Dynamic Agent Priority" on page 122.

To add an agent

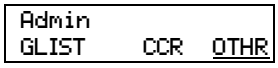
1 Press [✆] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



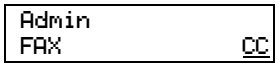
2 Enter the user password and press OK.



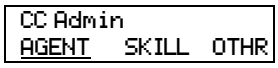
3 Press OTHR.



4 Press OTHR.

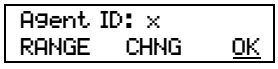


5 Press CC.

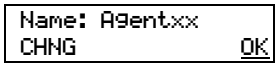


6 Press AGENT.

7 Press ADD.

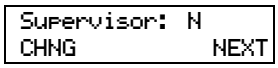


8 The first available agent number is shown.
Press CHNG to change the agent number and enter a new agent number
or
press OK to continue.

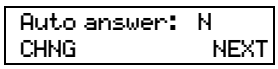


9 Press CHNG to enter the agent's name
or
press OK to go to step 11.

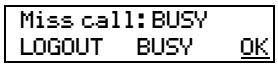
10 Enter the agent's name and press OK.



11 Press NEXT to keep the agent at agent status
or
press CHNG and then NEXT to give the agent supervisor status.



12 Press NEXT if you do not want calls to be force-delivered to the agent
or
press CHNG and then NEXT if you want calls to be force-delivered to the agent.



13 Press OK to accept BUSY (Make Agent Busy) as the Missed Call option
or
press LOGOUT to select Automatic Logout and press OK.

14 Press OK if you want prompting for Activity codes to be optional,
or
press PRMPT if you want agents to be prompted and press OK.
NOTE: This step appears only if you use Reporting for Contact Center.

15 Press ☎ to end the session.

Changing an agent

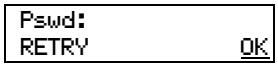
After you add an agent, you can change their properties. You must use this procedure if the system times out while you are adding an agent.

The properties you can change for an agent are:

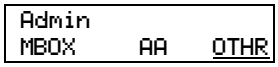
- password
- supervisor status
- auto answer options
- missed call options
- Activity Codes

To change agent properties

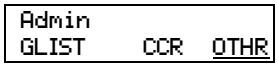
1 Press ✆ 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



2 Enter the user password and press OK.

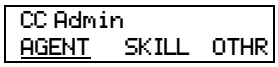


3 Press OTHR.



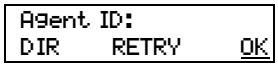
4 Press OTHR.

5 Press CC.

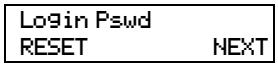


6 Press AGENT.

7 Press CHNG.



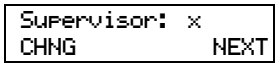
8 Enter the ID number of the agent you want to change and press OK.
If you do not know the agent's ID number press DIR to search the directory.



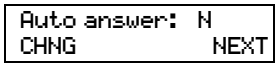
9 Press RESET if you want to reset the agent's password
or
press NEXT.

10 Press CHNG if you want to change the agent's name
or
press NEXT and go to step 11.

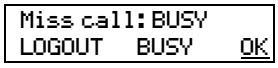
11 Enter the new agent's name and press OK.



12 Press CHNG and press NEXT if you want to change the agent's supervisor status
or
press NEXT.



13 Press NEXT if you do not want calls to be force-delivered to the agent
or
press CHNG and then NEXT if you want calls to be force-delivered to the agent.



14 Press OK to accept BUSY (Make Agent Busy) as the Missed Call Option
or
press LOGOUT to select Automatic Logout and press OK.

15 Press OK if you want prompting for Activity codes to be optional,
or
press PRMPT if you want agents to be prompted and press OK.
NOTE: This step appears only if you use Reporting for Contact Center.

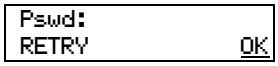
16 Press ☎ to end the session.

Adding multiple agents

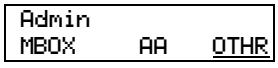
You can save time by adding more than one agent at a time. When you add multiple agents, the agents have the default agent name and parameters.

To add multiple agents

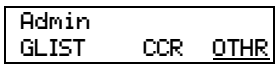
1 Press ✆ 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



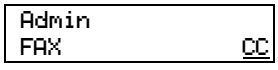
2 Enter the user password and press OK.



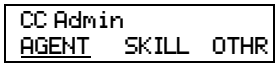
3 Press OTHR.



4 Press OTHR.

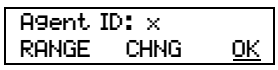


5 Press CC.

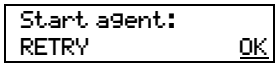


6 Press AGENT.

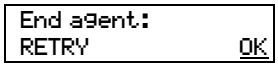
7 Press ADD.



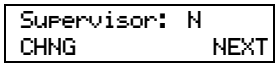
8 The first available agent number is shown.
Press RANGE to add a range of new agents.



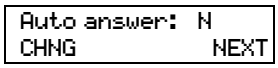
9 Enter the start of the range and press OK.



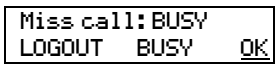
10 Enter the end of the range and press OK.



11 Press NEXT to keep the agent at agent status
or
press CHNG and then NEXT to give the agent supervisor status.



12 Press NEXT if you do not want calls to be force-delivered to the agent
or
press CHNG and then NEXT if you want calls to be force-delivered to the agent.



13 Press OK to accept BUSY (Make Agent Busy) as the Missed Call option
or
press LOGOUT to select Automatic Logout and press OK.

14 Press OK if you want prompting for Activity codes to be optional,
or
press PRMPT if you want agents to be prompted and press OK.
NOTE: This step appears only if you use Reporting for Contact Center.

15 Press ☎ to end the session.

Assigning an agent to a skillset

You can assign an agent to one or more skillsets. Each agent is responsible for answering calls for the skillsets they are assigned to.

Note: Before you can add an agent to a skillset, the skillset must be disabled. For how to disable a skillset see "Disabling a skillset" on page 56.

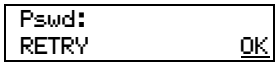
Dynamic Agent Priority

Agents can have different priorities depending on which skillset they are logged onto. For example, when an agent is a member of the English skillset, their priority can be 1 because they are fluent in English. The same agent can have a priority of 3 when they are logged onto the Spanish skillset, and a priority of 6 when they are logged onto the German skillset.

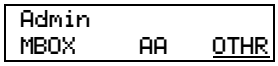
If the method of call distribution for the skillset is Preferred, the agent with the highest priority receives the call. The agent priority ranges from 1 to 20. 1 is the highest agent priority for the most qualified agents. The default value is 10.

To assign an agent to a skillset

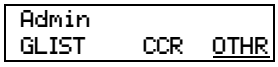
1 Press ✆ 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



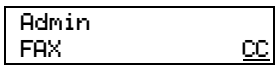
2 Enter the user password and press OK.



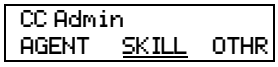
3 Press OTHR.



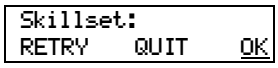
4 Press OTHR.



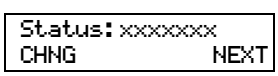
5 Press CC.



6 Press SKILL.

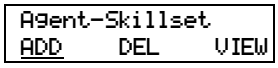


7 Enter the number of the skillset you want to add an agent to and press OK.



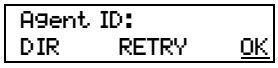
8 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable a skillset, see "Disabling a skillset" on page 56. Press NEXT to continue.

9 Press AGENT.

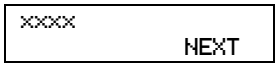


10 Press ADD.

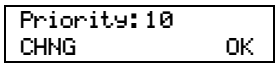
11 Press INDIV.



12 Enter the ID number of the agent you want to assign and press OK
or
press DIR to search the directory.

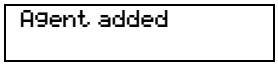


13 The display shows the agent's name.
Press NEXT.



14 This display shows the dynamic priority level of the agent.

Press OK to accept 10 as the agent's priority level in the skillset
or
press CHNG and enter a priority level from 1to 20.
10 is the default.



15 This display appears briefly.

16 Press ☎ to end the session
or
press INDIV to add another agent and follow steps 10 through 13.

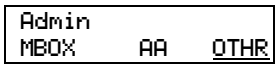
Assigning several agents to a skillset

You can save time by adding several agents to a skillset at once. Agents that are already assigned to the skillset are not added again.

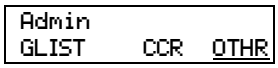
To assign several agents to a skillset

1 Press ✆ 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*

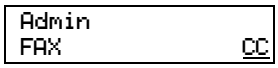
2 Enter the user password and press OK.



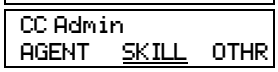
3 Press OTHR.



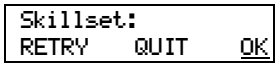
4 Press OTHR.



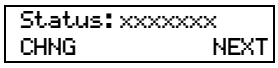
5 Press CC.



6 Press SKILL.

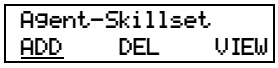


7 Enter the number of the skillset you want to assign several agents to and press OK.



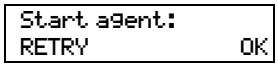
8 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable a skillset, see "Disabling a skillset" on page 56. Press NEXT to continue.

9 Press AGENT.

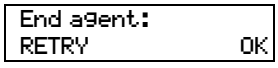


10 Press ADD.

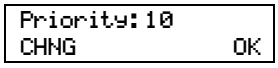
11 Press RANGE.



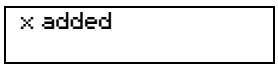
12 Enter the ID number of the first agent you want to assign and press OK.



13 Enter the ID number of the last agent you want to assign and press OK.



14 This display shows the dynamic priority level of the agent.
Press OK to accept 10 as the agent's priority level in the skillset
or
press CHNG and enter a priority level from 1 - 20.
10 is the default.



15 This display appears briefly.

16 Press ☎ to end the session.

Assigning agents to a skillset using Auto Login

Use the Auto Login feature to assign agents to skillsets. This action can only be performed using CallPilot Manager. Using Auto Login, agents can log in automatically to preconfigured sets and skillsets and DNs on start-up. The feature is configured as a skillset agent property. When adding an agent to a skillset, the administrator can choose to have that agent automatically log into the skillset at a specific DN when the Contact Center starts up. Auto Login is useful when agents are not assigned to one specific telephone set and move around the contact center as needed. With Auto Login, all of the telephone sets are able to receive skillset calls and, when used in conjunction with a Not Ready Timeout, can remain available even after a call is not answered.

If the DN is not available, then the agent is not logged in automatically until Contact Center is restarted and the DN is available.

Configuring automatic log in

1 From the CallPilot Manager, click **Change**. The agent's properties page will appear.

2 Select a DN to log into. This designates the DN for all skillsets.

3 Return to the skillset properties and select the list of skillsets assigned to that agent.

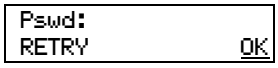
4 Select the agent and check **Auto-login**.

Removing agents from a skillset

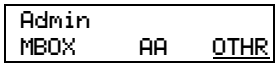
You can remove an agent from a skillset. When you remove an agent, they are removed from the skillset but not from Contact Center. You can assign the agent to another skillset.

To remove agents from a skillset

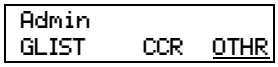
1 Press [⌂] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



2 Enter the user password and press OK.

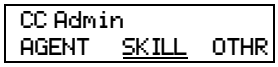


3 Press OTHR.

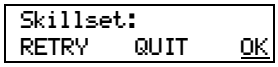


4 Press OTHR.

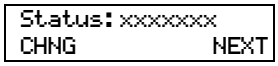
5 Press CC.



6 Press SKILL.

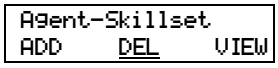


7 Enter the number of the skillset you want to remove an agent from and press OK.

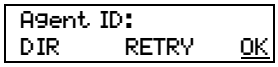


8 The display shows whether the skillset is enabled or disabled.
The skillset must be disabled before you can delete an agent from it. To disable a skillset, see "Disabling a skillset" on page 56.
Press NEXT to continue.

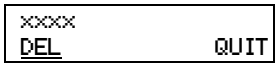
9 Press AGENT.



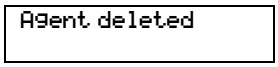
10 Press DEL.



11 Enter the ID number of the agent you want to remove and press OK.



12 The display shows the agent's name.
Press DEL.



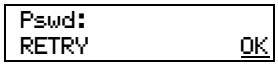
13 This display appears briefly.

14 Press [⌂] to end the session.

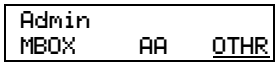
To view agents in a skillset

You can review the agents in a skillset.

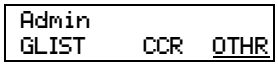
1 Press [e] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



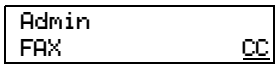
2 Enter the user password and press OK.



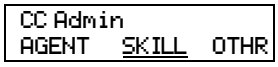
3 Press OTHR.



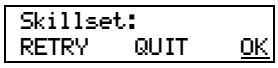
4 Press OTHR.



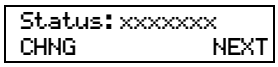
5 Press CC.



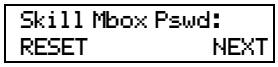
6 Press SKILL.



7 Enter the number of the skillset you want to view and press OK.

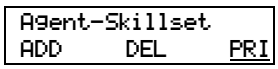


8 The display shows whether the skillset is enabled or disabled.
Press NEXT to continue.

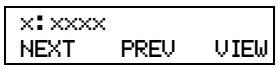


9 Press NEXT to continue.

10 Press AGENT.



11 Press PRI.

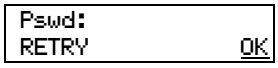


12 The display shows the agent with the lowest ID number in the skillset and the agent's current priority.
Press NEXT to see the next agent or PREV to see the previous agent.

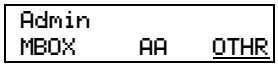
13 Press [on] to end the session.

To log an agent off

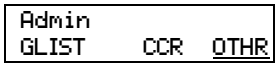
1 Press [✆] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



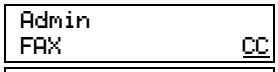
2 Enter the user password and press OK.



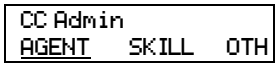
3 Press OTHR.



4 Press OTHR.



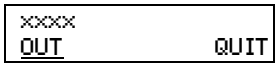
5 Press CC.



6 Press AGENT.

7 Press [8]. This option does not appear as a display button option.

8 Enter the agent's ID number and press OK.

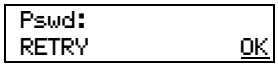


9 The agent's name is displayed.
Press OUT.
You will see Logged out if the agent is logged in, or Not logged in if the agent is logged out.

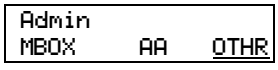
10 Press [☎] to end the session.

To delete an agent

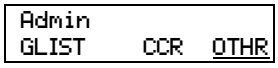
1 Press [✆] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



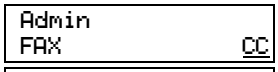
2 Enter the user password and press OK.



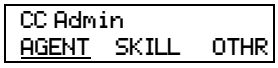
3 Press OTHR.



4 Press OTHR.

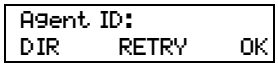


5 Press CC.



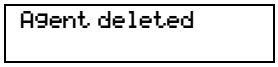
6 Press AGENT.

7 Press DEL.



8 Enter the agent's ID number and press OK
or
press DIR to search the directory.

9 The agent's name is displayed. Press DEL.

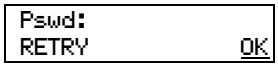


10 The display shows the agent is deleted.

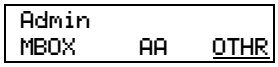
11 Press ☎ to end the session.

To reset an agent password

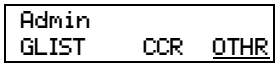
1 Press [phone] 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



2 Enter the user password and press OK.

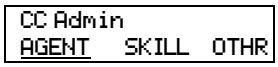


3 Press OTHR.



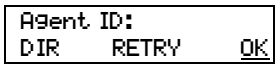
4 Press OTHR.

5 Press CC.

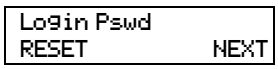


6 Press AGENT.

7 Press CHNG.



8 Enter the ID number of the agent you want to change and press OK.
If you do not know the agent's ID number press DIR to search the directory.



9 Press RESET to reset the agent's password.

10 Press [phone] to end the session.

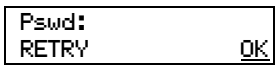
Changing an agent priority

Before you can change an agent's priority:

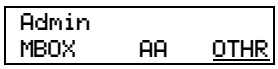
- the skillset must be disabled. See "Disabling a skillset" on page 56.
- the agent must be logged off. See "To log an agent off" on page 128.

To change an agent priority

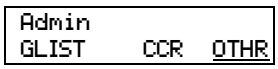
1 Press [✆] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



2 Enter the user password and press OK.

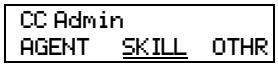


3 Press OTHR.

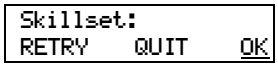


4 Press OTHR.

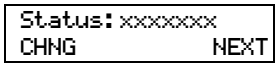
5 Press CC.



6 Press SKILL.

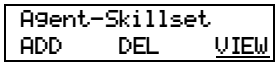


7 Enter the number of the skillset you want to view and press OK.



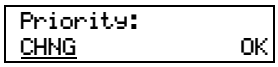
8 The display shows whether the skillset is enabled or disabled. Press NEXT to continue.

9 Press AGENT.

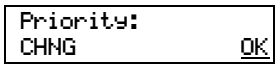


10 Press VIEW.

11 The display shows the agent with the lowest ID number in the skillset. You can press NEXT to see the next agent or PREV to see the previous agent.
or
press VIEW to change the priority of the agent.



12 Press CHNG to change the priority of the agent.



13 Press OK.
Repeat steps 11 to 13 to change other agent's priority.

14 Press [☎] to end the session.

Chapter 9
Intelligent Overflow Routing

Use Intelligent Overflow Routing to control how calls are handled that are waiting in a skillset for an agent. You can specify that a waiting call:

- overflows to one or more skillsets and keeps its conditions and original skillset greetings. Agents from the specified skillsets can answer the call.
- moves to another skillset where the call loses its conditions, and takes on the properties of the new skillset, including skillset greetings. The system tracks the total length of the call from the time the call enters the system until it is answered.
- transfers to the skillset mailbox
- transfers to an extension, mailbox, external telephone number, CCR Tree, Automated Attendant or operator
- changes in priority level

Intelligent Overflow Routing handles calls differently depending on the rules that you create. Each rule is based on a mode, one or more conditions, and one or more actions.

Mode

Intelligent Overflow Routing looks at the mode the skillset is in to determine how to handle a call. A skillset can be in Day mode, Night mode, or 24 Hour Service. Each mode can have its own rules for how to handle calls. The default mode is Day.

Condition

After Intelligent Overflow Routing determines what mode the skillset is in, Intelligent Overflow Routing determines what conditions apply to the call. The two possible conditions are:

- Whether the timer expires. You set the length of time a call waits for an agent before the call is sent to the destination that you specify. The maximum time a call can wait is 59:59. When a call enters a skillset, the timer starts at 00:00. Overflow rules are applied according to the time a call is in a skillset, not according to the total time a call is in the system. For example, if you set up skillset 1 to move a call to skillset 2 after five minutes, and you set up skillset 2 to move a call to skillset 1 after two minutes, a call in skillset 1 will be moved to skillset 2 after five minutes. The call will move back to skillset 1 after an additional two minutes, then back to skillset 2 after an additional five minutes.

- Whether there are agents logged on to the skillset. If there are no agents logged on to the skillset, the call is sent to the destination that you specify. If you select the Agents Not Logged In check box, the overflow rule applies if there are no agents logged on to the skillset. If you do not select the Agents Not Logged In check box, the overflow rule applies if there are agents logged on to the skillset.

Note: You can select both conditions within the same rule. The rule applies when both conditions are met.

Action

When Intelligent Overflow Routing determines that a condition is met for the call, the call goes to the destination you specify. Possible actions are:

- moving the call to a new skillset.
  The caller hears the greetings for the new skillset.
- overflowing the call to one or more skillsets.
  The caller continues to hear the greetings from the original skillset.
- sending the call to the skillset mailbox
- transferring the call to an extension, external number, mailbox, skillset mailbox, Automated Attendant, CCR Tree or operator
- changing the priority of the call

Note: If an overflow step is configured for No Agents, the overflow rule executes right away, and even a forced greeting will not play. If you want to play the greeting, configure a timer with the No Agents rule.

Examples of Intelligent Overflow Routing rules

Intelligent Overflow Routing gives you flexibility in setting the rules for how calls are handled. The following tables show examples of different ways you can configure Intelligent Overflow Routing rules.

Example 1

In this example, calls to the contact center go to skillset 1, which is the company's service department. If a call is not answered by an agent within two and a half minutes, the call overflows to skillset 2 the sales department skillset. An agent from any of the two skillsets can answer the call.

The Contact Center Administrator:

- selects the Day service mode
- sets the timer for 2 minutes and 30 seconds
- selects Overflow to Skillset as the action
- selects skillsets 2 and 3

Mode	Conditions	Action	Explanation
Day	02:30	Overflow: 2	This Intelligent Overflow Routing rule applies only if there are one or more agents are logged on. If a call is not answered by an agent before 2 minutes and 30 seconds, the call overflows to skillset 2. When a call overflows, it also remains queued at the original skillset destination.

Note: If you want calls to overflow to multiple skillsets, specify all the skillsets in the same rule. The call bypasses skillsets with busy agents and overflows to the next skillset with an available agent.

Example 2

In this example, calls to the contact center go to skillset 1. The Administrator wants to ensure that lower priority calls do not wait in a skillset indefinitely. If a call waits for 2 minutes or more, a higher priority is assigned to the call.

The Contact Center Administrator:

- selects the 24 Hour Service mode
- sets the timer for 2 minutes
- selects Change Call Priority only as the action and selects 1 as the new call priority

Mode	Conditions	Action	Explanation
24 Hour	02:00	Change call priority to 1	This Intelligent Overflow Routing rule applies to any call that has been waiting in skillset 1 for 2 minutes. If a call is not answered by an agent when the timer elapses, the call priority changes to the highest priority.

Example 3

In this example, calls to the contact center go to skillset 1, which is the company help line. If there are no agents logged on to the help line, the call moves to skillset 2, which is the company's service department. When a call moves to a new skillset, it does not remain queued at the original skillset destination.

The Contact Center Administrator:

- selects the Day service mode
- selects the Agents not logged in check box
- selects Move to Skillset as the action
- selects skillset 2

Mode	Conditions	Action	Explanation
Day	No Agents	Move to Skillset 2	Intelligent Overflow Routing checks to see whether agents are logged on to skillset 1, but does not check the timer. If there are no agents logged on to skillset 1, the call moves to skillset 2 and gets the new greetings for skillset 2. When a call moves to a new skillset, it does not remain queued at the original skillset destination.

Example 4

In this example, calls to the contact center go to skillset 1, which is the company help line. If no agents are logged on to skillset 1, the call immediately moves to skillset 2. If agents are logged on to skillset 1 and the call is not answered within two and a half minutes, the call transfers to the skillset mailbox where the caller can leave a message.

The Contact Center Administrator creates two rules. In the first rule the Contact Center Administrator:

- selects the 24 Hour service mode
- selects the Agents not logged in check box
- selects Move to Skillset as the action
- selects skillset 2

In the second rule the Contact Center Administrator:

- selects the 24 Hour service mode
- sets the timer to 2 minutes and 30 seconds
- selects the skillset mailbox as the action

Mode	Conditions	Action	Explanation
24 Hour	No Agents	Move to Skillset 2	The call moves to skillset 2 if no agents are logged on. If agents are logged on and the call is not answered within 2 minutes and 30 seconds, the call transfers to the skillset mailbox.
24 Hour	02:30	Skillset Mailbox	

Example 5

In this example, calls to the contact center go to skillset 1, which is the company's help line. If the call is not answered by an agent within 2 minutes and 30 seconds and if there are no agents logged on to skillset 1, the call overflows to skillset 2, which is the service department. If the call is not answered within an additional two minutes, the call transfers to the skillset mailbox where the caller can leave a message.

The Contact Center Administrator creates two rules. In the first rule the Contact Center Administrator:

- selects the Day service mode
- sets the timer to 2 minutes and 30 seconds
- selects the Agents not logged in check box
- selects Overflow to skillset as the action
- selects skillset 2

In the second rule the Contact Center Administrator:

- selects the Day service mode
- sets the timer to 4 minutes and 30 seconds
- selects the Agents not logged in check box
- selects the skillset mailbox as the action

Mode	Conditions	Action	Explanation
Day	02:30 and No Agents	Overflow: 2	The call overflows to skillset 2 after the call is in skillset 1 for 2 minutes and 30 seconds and if there are no agents logged on to skillset 1. If the call is not answered within an additional 2 minutes the call transfers to the skillset mailbox.
Day	04:30 and No Agents	Skillset Mailbox	

Example 6

In this example, calls to the contact center go to skillset 1, which is the company's help line. The Night Service Mode is set to start at 6:00 pm. After 6:00 pm there are no other skillsets with agents logged on. If no agents are logged on to skillset 1 or if the call is not answered by an agent within two and a half minutes, the call transfers to the skillset mailbox.

In this example, the Contact Center Administrator inserts two rules. The Contact Center Administrator:

- selects the Night service mode for both rules
- sets the timer to 2 minutes and 30 seconds as the condition for the first rule
- selects the Agents not logged in check box as the condition for the second rule
- selects the skillset mailbox as the action for both rules

Mode	Conditions	Action	Explanation
Night	02:30	Skillset Mailbox	The call transfers to the skillset mailbox if the call is not answered within 2 minutes and 30 seconds.
Night	No Agents	Skillset Mailbox	The call transfers to the skillset mailbox if there are no agents logged on to skillset 1.

Example 7

In this example, calls to the contact center go to skillset 1, which is the company's order desk. Skillset 1 agents are the company's experienced sales agents. If no agents are logged on to skillset 1 and if the call is not answered by an agent within two and a half minutes, the call overflows to skillset 2. Skillset 2 agents are the company's less experienced sales agents.

The Contact Center Administrator:

- selects the Day service mode
- sets the timer to 2 minutes and 30 seconds
- selects the Agents not logged in check box
- selects Overflow as the action
- selects skillset 2

Mode	Conditions	Action	Explanation
Day	02:30 and No Agents	Overflow: 2	The call overflows to skillset 2 if the call is not answered within 2 minutes and 30 seconds and if there are no agents logged on to skillset 1.

Example 8

In this example, calls to the contact center are answered by skillset 1, the company's sales skillset. If a call is not answered within 10 seconds, it overflows to skillset 2. If the call is not answered within an additional 20 seconds, the call goes to the skillset 1 mailbox.

The Contact Center Administrator creates two rules.

In the first rule the Contact Center Administrator:

- selects the Day service mode
- sets the timer to 10 seconds
- sets Overflow as the action
- selects skillsets 2

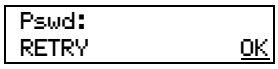
In the second rule the Contact Center Administrator:

- selects the Day service mode
- sets the timer to 30 seconds
- selects the skillset mailbox as the action

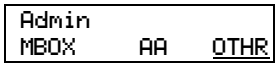
Mode	Conditions	Action	Explanation
Day	00:10	Overflow: 2	The call overflows to skillset 2 if the call is not answered within 10 seconds. The call goes to the skillset mailbox if it is not answered within an additional 20 seconds.
Day	00:30	Skillset Mailbox	

To add Overflow rules

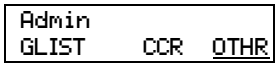
1 Press [✆] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



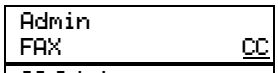
2 Enter the user password and press OK.



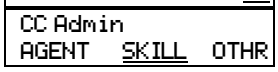
3 Press OTHR.



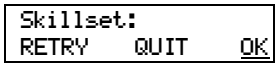
4 Press OTHR.



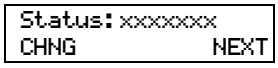
5 Press CC.



6 Press SKILL.



7 Enter the number of the skillset you want to change and press OK.

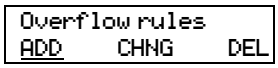


8 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable the skillset Press CHNG and press NEXT to continue.

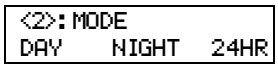
9 Press NEXT to continue.

10 Press OTHR.

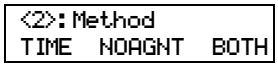
11 Press OVFLW.



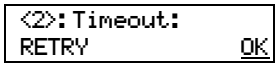
12 Press ADD.



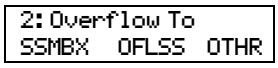
13 The display shows the Overflow rule number
Select whether you want the rule to apply to Day, Night or 24 Hour mode. Day is the default.



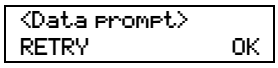
14 Select TIME if you want Overflow Routing to time how long the call waits in the skillset before it goes to the destination that you specify
or
select NOAGNT if you want Overflow to apply if there are no agents logged onto the skillset
or
select BOTH if you want Overflow to apply if you want TIME and NOAGNT to apply.



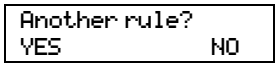
15 Enter the time that a call waits in the skillset before it goes to the destination that you specify and press OK.



16 Press SSMBX if you want calls to overflow to the skillset mailbox and in the next step enter the mailbox number
or
press OFLSS if you want calls to overflow to another skillset and in the next step enter the skillset number
or
press OTHER for more destinations: Move to another skillset, Transfer or Change call Priority, and in the next step enter the information about where you want to overflow calls.



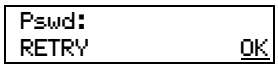
17 Enter the information about where you want to overflow calls and press OK.
The appearance of this display depends on what kind of overflow you choose.



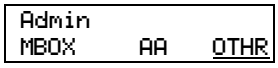
18 Press YES if you want to change or view another Overflow rule
or
press NO to return to the Overflow display shown in step 11
or
press ☎ to end the session.

To change and view Overflow rules

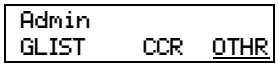
1 Press ✆ 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



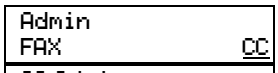
2 Enter the user password and press OK.



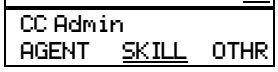
3 Press OTHR.



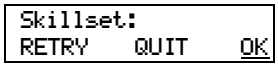
4 Press OTHR.



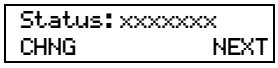
5 Press CC.



6 Press SKILL.



7 Enter the number of the skillset you want to change and press OK.



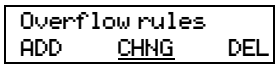
8 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable the skillset Press CHNG and press NEXT to continue.

9 Press NEXT to continue.

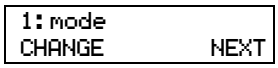
10 Press NEXT to continue.

11 Press OTHR.

12 Press OVFLW.

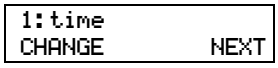


13 Press CHNG.



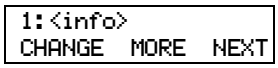
14 The first Overflow rule, shown here as rule 1, is displayed.
If you want to change another rule, press NEXT until you see the display in step 19.

Press CHANGE if you want to change the mode of the Overflow rule (mode is either Day, Night or 24 Hour)
or
press NEXT to continue.

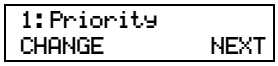


15 Press CHANGE if you want to change the time of the Overflow rule
or
press NEXT to continue.
If you do not have a time set for this Overflow rule this display does not appear.

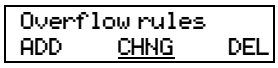
16 Press CHANGE if you want to change the agent setting of the Overflow rule
or
press NEXT to continue.



17 The display shows additional information about the Overflow rule. What appears depends on the parameters for the rule.
Press CHANGE to change the information displayed
or
press MORE to view more information about the rule
or
press NEXT to continue.



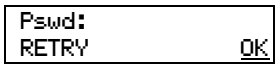
18 Press CHANGE if you want to change the priority of the Overflow rule
or
press NEXT to continue.
If you do not have a priority setting configured this display does not appear.



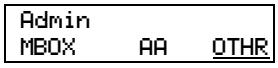
19 Press ☎ to end the session.

To delete Overflow rules

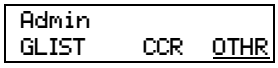
1 Press [✆] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide.*



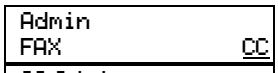
2 Enter the user password and press OK.



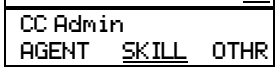
3 Press OTHR.



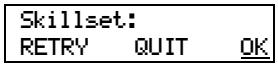
4 Press OTHR.



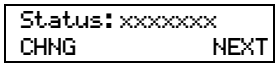
5 Press CC.



6 Press SKILL.



7 Enter the number of the skillset you want to change and press OK.

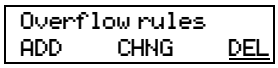


8 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable the skillset Press CHNG and press NEXT to continue.

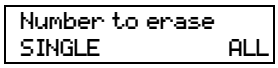
9 Press NEXT to continue.

10 Press OTHR.

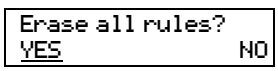
11 Press OVFLW.



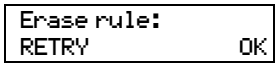
12 Press DEL.



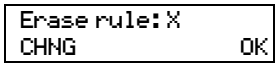
13 Press SINGLE to erase one rule and go to step 15
or
press ALL to erase all the overflow rules for the skillset and go to the next step.



14 Press YES to erase all the overflow rules for the skillset and go to step 17.



15 Enter the number of the rule you want to delete and press OK.



16 Press OK to confirm the deletion
or
press CHNG and enter the number of the rule you want to delete.

17 Press ☎ to end the session.

Chapter 10
Routing table administration

Routing tables determine how the system answers, holds and routes incoming calls to agents in your contact center. You set up routing tables to handle incoming calls for each skillset. A call in a skillset receives the treatment specified by the routing table. The treatment can be a combination of greetings, transfers, and being on hold. If an agent becomes available, the call is sent to the available agent.

Each skillset has a Day and a Night Routing Table. Set up the Day Routing Table for your business hours. Set up the Night Routing Table for your non-business hours.

The maximum number of steps you can add to a routing table is 20. You can record the routing table steps you create in "Routing Tables" on page 205.

Note: You can add and delete steps to a routing table after the initial set up. You must disable the skillset, and then make necessary changes.

Setting up DID routing

You can route calls based on their Direct Inward Dialing (DID) number. DID is the ability to make a telephone call directly into an internal extension, without having to go through the operator.

To route DID calls, set up a DID target line and assign the target line to a skillset.

To set up DID routing for BCM

1. In Element Manager, set up a DID target line.
   For information about setting up a DID target line, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*
2. In CallPilot Manager, configure the target line number to be answered by Contact Center.
   For information about configuring lines, see "Configuring lines" on page 39.

Fax Detection

Contact Center can detect fax calls and route them to a skillset mailbox. If you want Contact Center to detect incoming faxes, you must make your first routing table step:

- a Greeting step
- with Forced Play
- without a transfer
- with a greeting that is a minimum of 11 seconds long

Fax Detection applies only if a fax machine is attempting to transmit a fax at the start of a greeting. If a fax transmission starts several seconds after the start of a greeting, it is possible for the fax tone not to be detected.

If you do not set up the routing table to detect a fax call, some fax calls can be routed to agents, and some fax calls can be routed to the routing table's skillset mailbox.

To enable a routing table to detect fax calls, change the first step.

About types of Routing Table steps

You can add these types of steps to routing tables:

Greeting	A Greeting step plays a greeting to callers waiting in a skillset. You assign greeting parameters to each greeting. After the greeting plays, the call goes to the next routing step. If there is no next step, the call ends.
Distribute for	During a distribute for step, calls wait to be distributed to agents. If no agents are available before the distribution time expires, the call goes to the next step in the routing table. If there is no next step set up in the routing table, the call ends. The minimum distribution time is zero and the maximum distribution time is 59 minutes and 59 seconds. The default distribution time is 30 seconds.
Goto	A Goto step is the last step in a routing table. A Goto step moves the caller to an earlier routing step. For example, if a Goto step points to step 1, the call goes back to step 1 and repeats the steps. The steps are repeated until an agent becomes available or the caller decides to leave a message in the skillset mailbox. The first step in a routing table cannot be a Goto step because there are no possible target steps yet. A Goto step cannot point to itself. A Goto step can only point to any previously created step.
Transfer	A transfer step can transfer calls to: • an extension • a mailbox • an external number • the Automated Attendant • an operator • a CCR Tree
Disconnect	A Disconnect step releases calls from the skillset. If the first step in a routing table is a Disconnect, Contact Center does not answer the call.

Adding a Greeting step

Greeting steps play a message to waiting callers. You must have a greeting recorded before you can use it in a Greeting step. For information about recording a Contact Center greeting, see "Recording a Contact Center greeting" on page 44.

Greeting step parameters

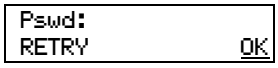
You can assign these parameters to greeting steps. If the first step in a routing table is a Greeting step, it can detect fax calls and route them to the skillset mailbox for the routing table. For more information, see "Fax Detection" on page 148.

Forced Play	Enable Forced Play for a greeting that contains important information that you want callers to hear. If an agent becomes available while a caller is listening to a Forced greeting, the greeting is not interrupted. The caller must listen to the entire greeting. If you do not enable Forced Play, when an agent becomes available the greeting is interrupted and the call goes to the available agent. Limit the number of Forced Play greetings and keep Forced Play greetings as short as possible. Long Forced Play greetings increase the transfer time of calls to agents and cause unpredictable increases in distribution times. For more information, see "Routing Table administration" on page 190.
Intelligent Caller Input Routing, Basic (Xfer)	While the greeting plays callers can: • press 1 to transfer to the Automated Attendant • press 0 to transfer to the Operator • press 9 to leave a message in the skillset mailbox • press 2 to transfer to a CCR Tree These are the default keypad buttons. You can change the keypad buttons. Ensure that the Non-business hours greetings have Intelligent Call Input Routing, Basic enabled so that callers can direct how they transfer their calls.

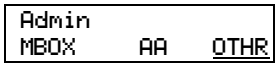
Intelligent Caller Input Routing, Advanced	Intelligent Caller Input Routing, Advanced uses the Caller Input Rules you create to change the priority and route calls to other skillsets or locations based on caller multi-digit DTMF input. Callers enter a sequence of DTMF digits such as a charge card number or passcode. The caller input is used to determine call treatment. Based on the caller input, the call can change in priority and/or be routed to: • the Automated Attendant • the Operator • the skillset mailbox • a CCR Tree • a mailbox • an extension • an external number • another skillset Intelligent Caller Input Routing, Advanced parameters: • Retries is 0-5, default is 2. This is the number of times a Data Entry step repeats itself on a caller entry error. • Number of Caller Input Rule tables is equal to the number of available skillsets.
No Intelligent Caller Input Routing (Norm)	While the greeting plays callers cannot press a dialpad button to transfer their call. Contact Center ignores buttons pressed on the dialpad. The greeting plays without interruption. This is the default setting. At the end of the greeting, the caller goes to the next routing step. If there is no next step, the call ends.

To add a Greeting step

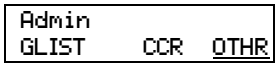
1 Press [⌂] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



2 Enter the user password and press OK.

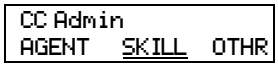


3 Press OTHR.

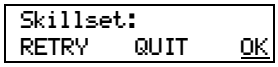


4 Press OTHR.

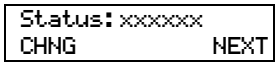
5 Press CC.



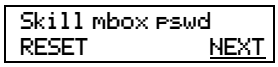
6 Press SKILL.



7 Enter the number of the skillset you want to add a Greeting step to and press OK.



8 If the skillset is enabled, press CHNG to disable it.
Press NEXT.

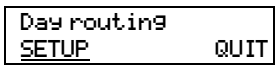


9 Press NEXT to continue.

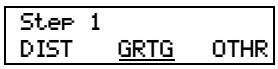
10 Press OTHR.

11 Press ROUTE.

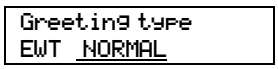
12 Press DAY or NIGHT.
In this example, Day is shown.



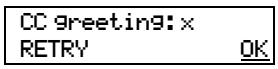
13 Press SETUP.



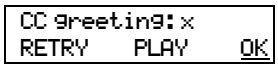
14 Press GRTG.



15 Press NORMAL.



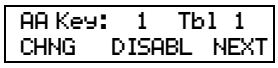
16 Enter the number of the greeting you want to use and press OK.



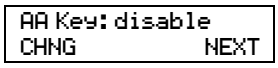
17 Press OK.

18 Assign the parameters for the Greeting step:

- If you want to use Norm, press OK and go to step 34.
- If you want the Greeting to be forced, press Force, press OK and go to step 34.
- If you want the Greeting to be forced and callers to be able to transfer after the greeting, press Force, press XFER and go to step 19.
- If you want callers to be able to transfer during the Greeting, press XFER and go to step 19.

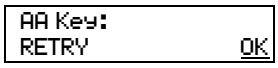


19 The display shows the default key for the Automated Attendant. Press CHNG if you want to change the key that callers press to reach the Automated Attendant and change which greeting table to use

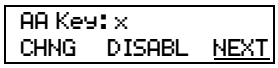


Note: If you do not want to assign a greeting table, enter 0 for Tbl
or
press DISABL if you do not want callers to be able to press a key to reach the Automated Attendant, press NEXT and go to step 22
or
press NEXT to accept the default key and go to step 22.

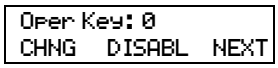
Note: If no Automated Attendant is selected, Tbl x is replaced with None.



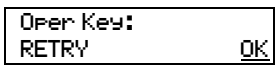
20 Enter the key you want to assign for the Automated Attendant and press OK.



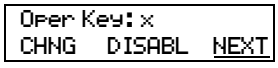
21 Press NEXT.



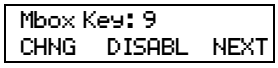
22 The display shows the default key for the Operator.
Press CHNG if you want to change the key that callers press to reach the Operator
or
press DISABL if you do not want callers to be able to press a key to reach the Operator, press NEXT and go to step 25
or
press NEXT to accept the default key and go to step 25.



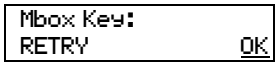
23 Enter the key you want to assign for the Operator and press OK.



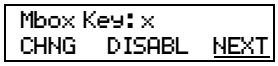
24 Press NEXT.



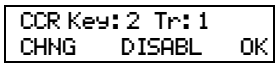
25 The display shows the default key for the skillset mailbox.
Press CHNG if you want to change the key that callers press to reach the skillset mailbox
or
press DISABL if you do not want callers to be able to press a key to reach the skillset mailbox, press NEXT and go to step 28
or
press NEXT to accept the default key and go to step 28.



26 Enter the key you want to assign for the skillset mailbox and press OK.

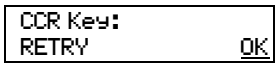


27 Press NEXT.

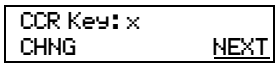


28 The display shows the default key for a CCR Tree.
Press CHNG if you want to change the key that callers press to reach the CCR Tree
or
press DISABL if you do not want callers to be able to press a key to reach the skillset mailbox, press NEXT and go to step 32
or
press OK to accept the default key and go to step 33.

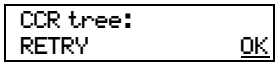
Note: You cannot let callers transfer to a CCR Tree unless you have created a CCR Tree. Refer to the *CallPilot Telephone Administration Guide* or the *CallPilot Manager Set Up and Operation Guide.*



29 Enter the key you want to assign for the CCR Tree and press OK.



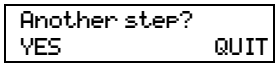
30 Press NEXT.



31 Enter the number of the CCR Tree you want callers to transfer to and press OK.

32 Press OK.

33 Press OK.



34 Press YES to continue to build the table
or
press ☎ to end the session.

If you want to continue to add steps to the table:

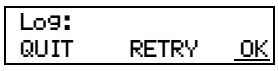
- To add a Distribute for step, start at step 10 of "To add a Distribute for step" on page 155.
- To add a Goto for step, start at step 10 of "Adding a Goto step" on page 156.

- To add a Transfer step, start at step 10 of "Adding a Transfer step" on page 158.
- To add a Disconnect step, start at step 10 of "Adding a Disconnect step" on page 161.

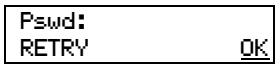
Note: You can add and delete steps to a routing table after the initial set up. You must disable the skillset, and then make necessary changes.

To add a Distribute for step

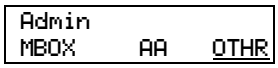
Distribute for steps put callers on hold while they wait for an agent.



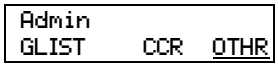
1 Press [⌂] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



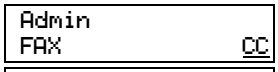
2 Enter the user password and press OK.



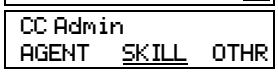
3 Press OTHR.



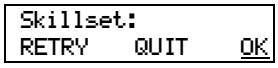
4 Press OTHR.



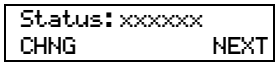
5 Press CC.



6 Press SKILL.



7 Enter the number of the skillset you want to add a Distribute step to and press OK.

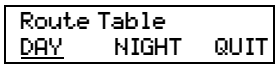


8 If the skillset is enabled, press CHNG to disable it.
Press NEXT.

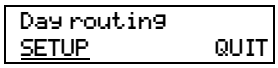
9 Press NEXT to continue.

10 Press OTHR.

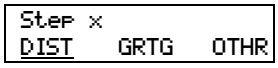
11 Press ROUTE.



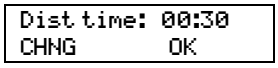
12 Press DAY or NIGHT.
In this example, Day is shown.



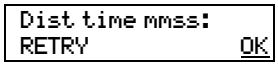
13 Press SETUP.



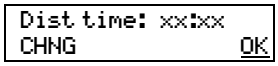
14 Press DIST.



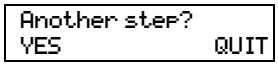
15 The default hold time is 00:30.
Press CHNG to change the default time
or
press OK to accept the default and go to step 18.



16 Enter the hold time and press OK.



17 Press OK.



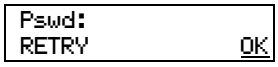
18 Press YES to add another step
or
press ☎ to end the session.

Adding a Goto step

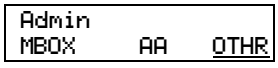
Goto steps send a caller to a previous step in the routing table. You can add a Goto step only to the end of a routing table. There must be additional steps in the route you are setting up.

To add a Goto step.

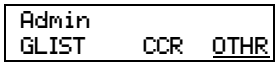
1 Press ✆ 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



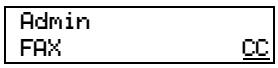
2 Enter the user password and press OK.



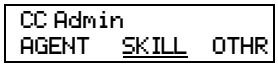
3 Press OTHR.



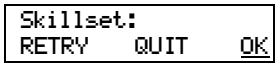
4 Press OTHR.



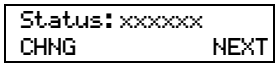
5 Press CC.



6 Press SKILL.



7 Enter the number of the skillset you want to add a Goto step to and press OK.

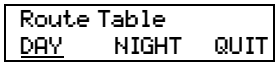


8 If the skillset is enabled, press CHNG to disable it.
Press NEXT.

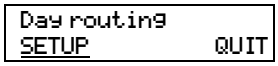
9 Press NEXT to continue.

10 Press OTHR.

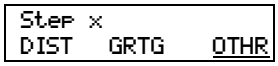
11 Press ROUTE.



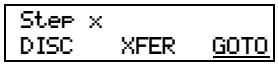
12 Press DAY or NIGHT.
In this example, Day is shown.



13 Press SETUP.

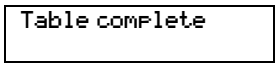


14 Press OTHR.



15 Press GOTO.

16 Press CHNG until the step is displayed that you want the call to go to and press OK
or
press OK to accept the step that is shown.



17 This display appears.
After you add a Goto step you cannot add more steps to the table.

18 Press ☎ to end the session.

Adding a Transfer step

A transfer step can transfer calls to:

- an extension
- a mailbox
- an external number
- the Automated Attendant
- an operator
- a CCR Tree

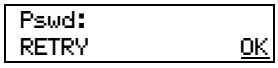
If you choose **Transfer to Auto Attendant** and have a CCR Tree assigned to the Auto Attendant Greeting Table, the call automatically transfers to the Home node of the CCR Tree. The Contact Center caller will not hear the Auto Attendant greeting.

If you want the caller to hear the Auto Attendant greeting when you choose **Transfer to Auto Attendant** as a step in the greeting table, select one of the following methods:

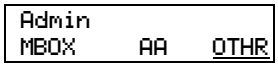
- Choose **Transfer to Auto Attendant** and set the CCR Tree to None in the Auto Attendant greeting table setup.
- Choose **Transfer to Auto Attendant** and assign a CCR Tree to the Auto Attendant greeting table. Record the prompt of the CCR Tree Home node so it is the same as the Auto Attendant company greeting that is skipped when the caller is transferred to Auto Attendant.
- Insert a Contact Center greeting step right before the **Transfer to Auto Attendant** step in the skillset routing table. This Contact Center greeting would be recorded the same as the Auto Attendant company greeting.
- Create a specific Auto Attendant table and CCR tree for Contact Center callers that transfer to Auto Attendant.

To add a Transfer step

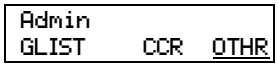
1 Press ✆ 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



2 Enter the user password and press OK.

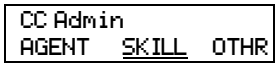


3 Press OTHR.

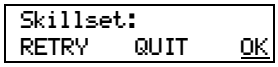


4 Press OTHR.

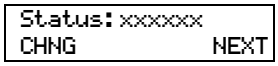
5 Press CC.



6 Press SKILL.



7 Enter the number of the skillset you want to add a Greeting step to and press OK.



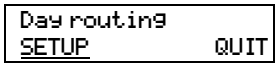
8 If the skillset is enabled, press CHNG to disable it.
Press NEXT.

9 Press NEXT to continue.

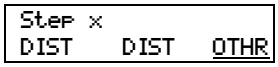
10 Press OTHR.

11 Press ROUTE.

12 Press DAY or NIGHT.
In this example, Day is shown.



13 Press SETUP.



14 Press OTHR.

15 Press XFER.
Goto appears only if this is not the first step.

(Continued on next page)

16 Add the type of transfer step you want to the Routing Table.

To transfer to an extension:

- Press EXTN
- Enter the extension number and press OK

To transfer to a mailbox:

- Press MBOX
- Enter the mailbox number and press OK

To transfer to an external number:

- Press OTHR
- Press EXTERN
- Press CHNG to select a line, pool or route as the outdial method
- Press NEXT
- Enter the line or line pool number and press OK
- Press OK
- Enter the telephone number you want to transfer the call to
- Press OK

To transfer to the Automated Attendant:

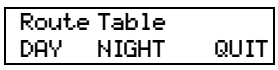
- Press OTHR
- Press AA
- Press CHNG
- Enter the number of the AA table and press OK

To transfer to the Operator:

- Press OTHR
- Press OTHR
- Press OPER
- Press OK

To transfer to a CCR Tree:

- Press OTHR
- Press OTHR
- Press OTHR
- Press CCR
- Enter the number of the CCR Tree and press OK
- Press OK



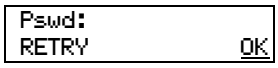
17 Press YES to add another step
or
press ☎ to end the session.

Adding a Disconnect step

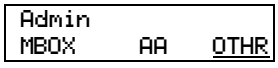
Disconnect steps release a call from the skillset it is in. If the first step in a routing table is a Disconnect step, Contact Center does not answer the line.

To add a disconnect step

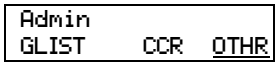
1 Press [Ø] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



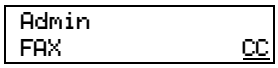
2 Enter the user password and press OK.



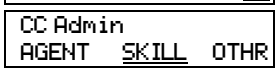
3 Press OTHR.



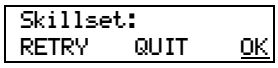
4 Press OTHR.



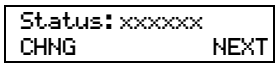
5 Press CC.



6 Press SKILL.



7 Enter the number of the skillset you want to add a Disconnect step to and press OK.

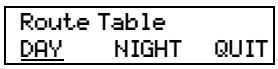


8 If the skillset is enabled, press CHNG to disable it.
Press NEXT.

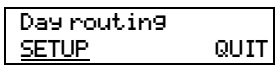
9 Press NEXT to continue.

10 Press OTHR.

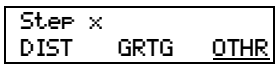
11 Press ROUTE.



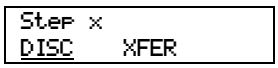
12 Press DAY or NIGHT.
In this example, Day is shown.



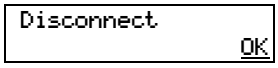
13 Press SETUP.



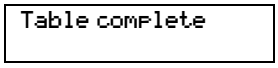
14 Press OTHR.



15 Press DISC.



16 Press OK.



17 Press ☎ to end the session.

Example of a Day Routing Table

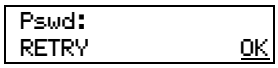
To set up the routing table steps shown in "Example of Day Routing Table steps", follow the procedure "To set up the Day Routing Table example".

Example of Day Routing Table steps

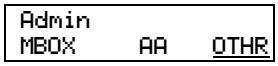
Step number	Type of step	Step parameters
1	Greeting	Greeting 1, information greeting Forced Transfer none enabled
2	Distribute for	1:00 (one minute)
3	Greeting	Greeting 2, general company greeting Not forced play Intelligent Call Input Routing, Basic with defaults
4	Distribute for	Accept default - distribute for 00:30 (thirty seconds)
5	Greeting	Greeting 3, please wait greeting Not forced play Intelligent Call Input Routing, Basic with operator default
6	Goto	Routing Table step 2

To set up the Day Routing Table example

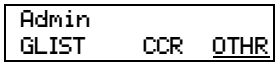
1 Press [⌂] 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



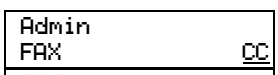
2 Enter the user password and press OK.



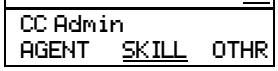
3 Press OTHR.



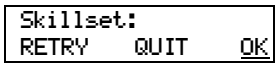
4 Press OTHR.



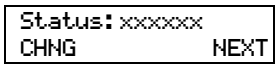
5 Press CC.



6 Press SKILL.

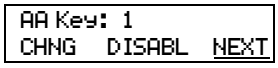


7 Enter the number of the skillset you want to set up and press OK.

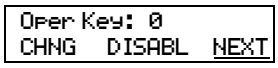


8 If the skillset is enabled, press CHNG to disable it.
Press NEXT.

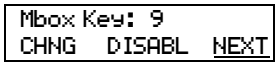
Skill mbox pswd RESET NEXT	**9** Press NEXT to continue.
Skillset Admin PARM AGENT OTHR	**10** Press OTHR.
Skillset Admin ROUTE OVFLW UNCF	**11** Press ROUTE.
Route Table DAY NIGHT QUIT	**12** Press DAY.
Day routing SETUP QUIT	**13** Press SETUP.
Greeting type EWT NORMAL	**14** Press NORMAL.
Step 1 DIST GRTG OTHR	**15** Press GRTG.
CC greeting: x RETRY OK	**16** Enter the number of the greeting you want to use and press OK.
CC greeting: x RETRY PLAY OK	**17** Press OK.
Type: Force Norm XFER OK	**18** Press Force and press OK.
Type: Norm Force XFER OK	**19** Press OK.
Another step? YES QUIT	**20** Press YES to continue to build the table.
Step 2 DIST GRTG OTHR	**21** Press DIST.
Dist time: 00:30 CHNG OK	**22** Press CHNG.
Dist time mmss: RETRY OK	**23** Enter 0100 and press OK.
Dist time: 01:00 CHNG OK	**24** Press OK.
Another step? YES QUIT	**25** Press YES.
Step 3 DIST GRTG OTHR	**26** Press GRTG.
Greeting type EWT NORMAL	**27** Press NORMAL.
CC greeting: x RETRY OK	**28** Enter the number of the greeting you want to use and press OK.
CC greeting: x RETRY PLAY OK	**29** Press OK.
Type: Norm Force XFER OK	**30** Press XFER.



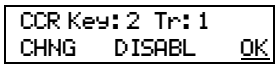
31 Press NEXT.



32 Press NEXT.

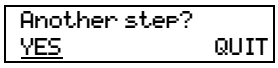


33 Press NEXT.

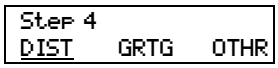


34 Press OK.

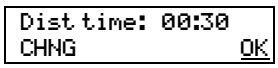
35 Press OK.



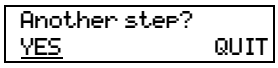
36 Press YES.



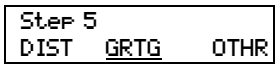
37 Press DIST.



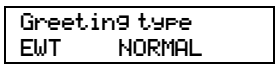
38 Press OK.



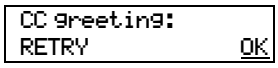
39 Press YES.



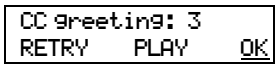
40 Press GRTG.



41 Press NORMAL.

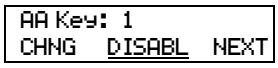


42 Press 3 and press OK.

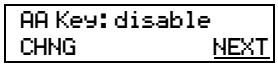


43 Press OK.

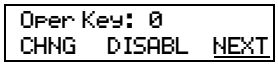
44 Press XFER.



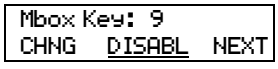
45 Press DISABL.



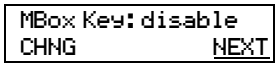
46 Press NEXT.



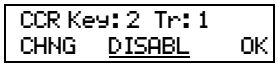
47 Press NEXT.



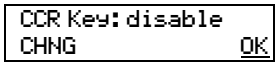
48 Press DISABL.



49 Press NEXT.

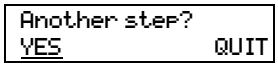


50 Press DISABL.



51 Press OK.

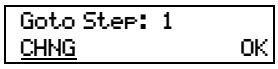
52 Press OK.



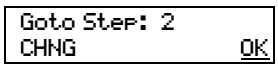
53 Press YES.

54 Press OTHR.

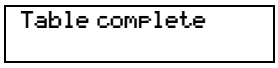
55 Press GOTO.



56 Press CHNG.



57 Press OK.



58 Press ☎ to end the session.

Example of a Night Routing Table

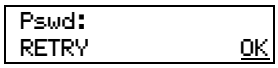
To set up the routing table steps shown in "Example of Night Routing Table steps", follow the procedure "To set up the Night Routing Table example".

Example of Night Routing Table steps

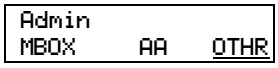
Step number	Type of step	Step parameters
1	Greeting	Greeting 6, non-business hours greeting Not forced play Intelligent Call Input Routing, Basic
2	Disconnect	There are no parameters for the Disconnect option.

To set up the Night Routing Table example

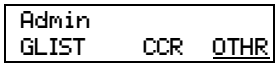
1 Press [⌂] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



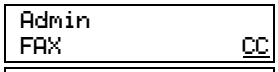
2 Enter the user password and press OK.



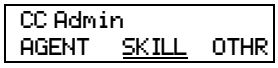
3 Press OTHR.



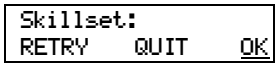
4 Press OTHR.



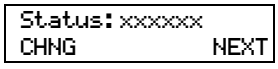
5 Press CC.



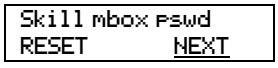
6 Press SKILL.



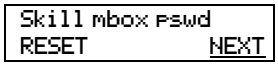
7 Enter the number of the skillset you want to set up and press OK.



8 If the skillset is enabled, press CHNG to disable it.
Press NEXT.



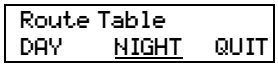
9 Press NEXT to continue.



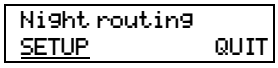
10 Press NEXT to continue.

11 Press OTHR.

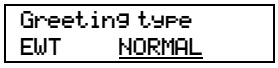
12 Press ROUTE.



13 Press NIGHT.

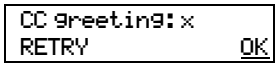


14 Press SETUP.

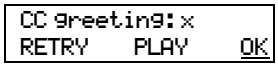


15 Press NORMAL.

16 Press GRTG.

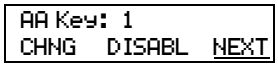


17 Press 6 and press OK.

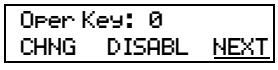


18 Press OK.

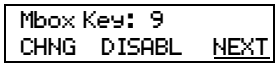
19 Press XFER.



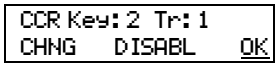
20 Press NEXT.



21 Press NEXT.

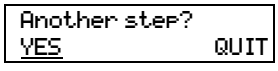


22 Press NEXT.



23 Press OK.

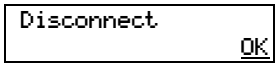
24 Press OK.



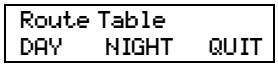
25 Press YES.

26 Press OTHR.

27 Press DISC.



28 Press OK.



29 Press ☎ to end the session

Changing a routing table

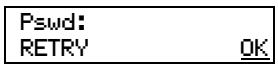
Note: You can add and delete steps to a routing table after the initial set up. You must disable the skillset, and then make necessary changes.

You must disable a skillset before you can change its routing table. To disable a skillset, see "Disabling a skillset" on page 56.

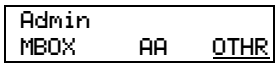
To	Follow the procedure
Review steps	"To review Routing Table steps" on page 170
Modify steps	"To modify Routing Table steps" on page 171
Erasing a routing table	"To erase a Routing Table" on page 173

To review Routing Table steps

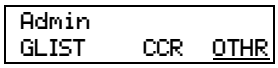
1 Press [phone] 9 8 3.
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



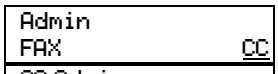
2 Enter the user password and press OK.



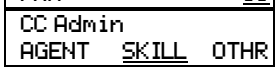
3 Press OTHR.



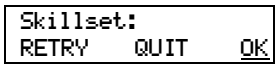
4 Press OTHR.



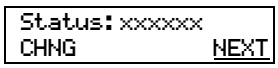
5 Press CC.



6 Press SKILL.



7 Enter the number of the skillset you want to review and press OK.

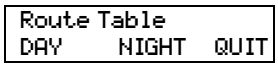


8 Press NEXT.

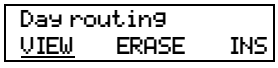
9 Press NEXT to continue.

10 Press OTHR.

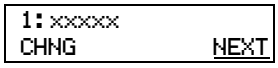
11 Press ROUTE.



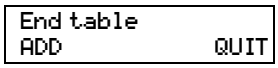
12 Press DAY or NIGHT.
In this example, Day is shown.



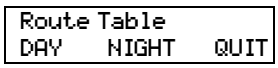
13 Press VIEW.



14 Press NEXT to view each remaining step.



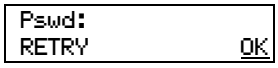
15 This display appears when you reach the last step.



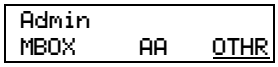
16 Press [phone] to end the session.

To modify Routing Table steps

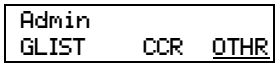
1 Press [⌂] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



2 Enter the user password and press OK.

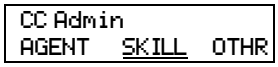


3 Press OTHR.

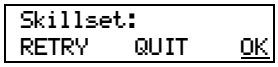


4 Press OTHR.

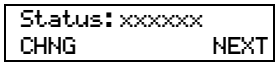
5 Press CC.



6 Press SKILL.



7 Enter the number of the skillset you want to modify a step for and press OK.



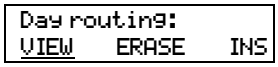
8 If the skillset is enabled, press CHNG to disable it.
Press NEXT.

9 Press NEXT to continue.

10 Press OTHR.

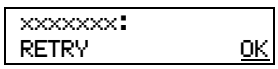
11 Press ROUTE.

12 Press DAY or NIGHT.
In this example, Day is shown.

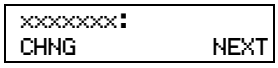


13 Press VIEW.

14 The display shows the first step in the routing table.
Press CHNG if this is the step you want to change
or
press NEXT until you find the step you want to change and then press CHNG.



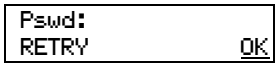
15 Change the parameters for the step and press OK.



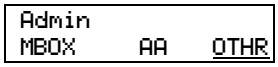
16 The display shows the new parameters for the step.
Press NEXT to view or change the next step
or
press ☎ to end the session.

To erase a Routing Table

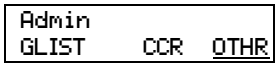
1 Press [Menu] [9] [8] [3].
Enter the telset User ID that has voice mail administration rights and press OK.
For information about creating a user with voice mail administration rights, see the *Nortel Business Communications Manager 5.0 Administration and Security Guide*.



2 Enter the user password and press OK.

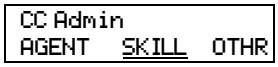


3 Press OTHR.

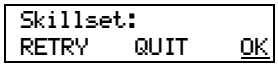


4 Press OTHR.

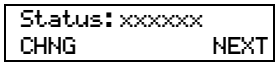
5 Press CC.



6 Press SKILL.



7 Enter the number of the skillset you want to delete a routing table from and press OK.



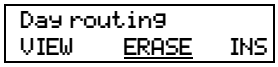
8 If the skillset is enabled, press CHNG to disable it.
Press NEXT.

9 Press NEXT to continue.

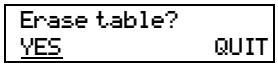
10 Press OTHR.

11 Press ROUTE.

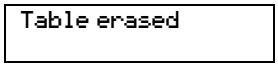
12 Press DAY or NIGHT.
In this example, Day is shown.



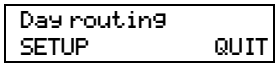
13 Press ERASE.



14 Press YES.



15 This display appears briefly.



16 Press SETUP if you want to create a new routing table
or
press [End] to end the session.

Setting the Service Modes for skillsets

You must set the Service Mode the skillset uses so that calls are answered correctly. You must set the Service Mode using [↩] 9 8 2 before calls are answered correctly.

Before you set the Service Mode you must:

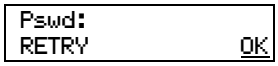
- configure a skillset
- set up at least a Day Routing Table for the skillset

The default Contact Center Service Mode is 24 hour operation. You can change the hours of operation using the Operator Feature Code ([↩] 9 8 2). There are six possible Service Modes:

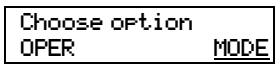
Auto	The skillset uses the Automatic Service Mode. You must configure both the Day and Night Routing Tables before you can assign the Automatic Service Mode to the skillset.
Day	The skillset uses the Manual Service mode and the Day Routing Table. You must configure the Day Routing Table before you can assign the Manual Service Mode and the Day Routing Table.
Night	The skillset uses the Manual Service mode and the Night Routing Table. You must configure the Night Routing Table before you can assign the Manual Service Mode and the Night Routing Table.
24 Hour	The skillset uses the Day Routing Table only. You must configure the Day Routing Table for 24 hour operation to use this Service Mode.
Uninit	The skillset is not configured. You must configure the skillset before you can assign the Service Mode.
Invalid	You have only partially configured the skillset. You cannot enable this skillset.

Note: If you originally configure the skillset with a Day Routing Table only and enable the skillset, Contact Center will recognize the Service Mode as Day. Afterwards, if you add a Night Routing Table, Contact Center still recognizes the Service Mode as Day. You must set the Service Mode to Auto to get Contact Center to function in the Auto Service Mode.

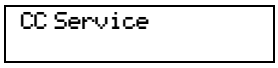
To set the Service Mode for a skillset



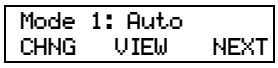
1 Press [✆] [9] [8] [2].
Enter the default Operator password [6] [7] [3] [7] [2] [8] [6] [7], (Operator) and press OK
or
if you changed the default Operator password, enter the new password and press OK.



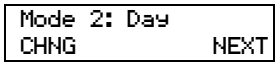
2 Press MODE.



3 This display appears briefly.



4 The display shows the Service Mode for skillset 1.
In this example, skillset 1 is in Auto mode.
Press CHNG if you want to change the Service Mode to Day or Night
or
press VIEW if you want to view the details for the Service Mode
or
press NEXT if you have a Day Routing Table for skillset 2.



5 The display shows the Service Mode for skillset 2.
In this example, skillset 2 is in Day mode.
Press CHNG if you want to change the Service Mode to Auto or Night
or
press VIEW if you want to view the details for the Service Mode
or
press NEXT.

6 Press [☎] to end the session.

Note: Remember to manually choose the Day Routing Table or the Automatic Service Mode when your business returns to regular hours.

Chapter 11
Monitoring call activity

There are two ways that you and supervisors can monitor call activity at your contact center:

- "Monitoring agent calls with Silent Monitor" on page 177
- "Monitoring skillsets" on page 179

You can monitor calls by using memory buttons that you program with the Feature Codes for monitoring:

- Display calls waiting in skillsets [✆] [9] [0] [9]
- Monitor agent calls [✆] [9] [0] [5].
  NOTE: To use [✆] [9] [0] [5], we recommend you program it to a memory button and press the [✆] [9] [0] [5] memory button to monitor agent calls.

For more information about monitoring agents, see the *Intelligent Contact Center Supervisor Guide*.

Monitoring agent calls with Silent Monitor

When you monitor calls as a Silent Monitor, you are not detected by the agent or callers. You monitor all of the calls on an agent's telephone, rather than on a call-by-call basis. When the current call is completed, the monitoring session of the agent continues. You do not have to reestablish the monitoring session. You must be logged on before you can monitor calls.

Note: While you monitor an agent's calls you monitor all of their calls, including their personal calls. Tell agents that if they make a call that they do not want monitored, they must first log off as an agent, then log on again when they complete the call.

We recommend you program a memory button with [✆] [9] [0] [5], and then press the [✆] [9] [0] [5] memory button to monitor calls. If the memory button you choose has an indicator, the indicator shows your log on status. You do not have Contact Center calls sent to you while you use [✆] [9] [0] [5].

To set up Silent Monitor on BCM

For monitoring to be silent, you must have Silent Monitor set up in Element Manager. To do this, you must be familiar with using the Business Communication Manager Element Manager. If you do not have access to the Element Manager, ask your system administrator to set up Silent Monitor.

1. In Element Manager, on the Task Navigation panel, click the **Configuration** tab.
   The configuration folders display.
2. Click the **Telephony** folder and then click the **Global Settings** folder.
3. Click the **Advanced Features** task.
4. Click the **Silent Monitor** heading.
5. From the **Monitoring Mode** list box, select **Silent**.
6. In the **Number of SM sets** box, enter the number of sets you want as supervisory telephones.
7. In the **SM Password box**, enter a six digit password.
8. Log off Element Manager.

Note: If you are using a BCM system, see the BCM Networking Configuration Guide for information about setting up Silent Monitor.

Note: If the Silent Monitor setting is set to non-silent there is a conference tone at the start of calls that you monitor, therefore monitoring isn't silent.
In the UK the default for Silent Monitor is non-silent. In North America the default is silent.

Using Silent Monitor with Answer DN

If you have an Answer DN programmed for your main telephone, and you are using Silent Monitor from your main telephone, the telephone that you have programmed as your Answer DN telephone rings briefly when:

- you monitor an agent who is not on a call, and the agent answers or places a call
- you start to monitor an agent who is on an active call
- you monitor an agent who puts a call on hold and answers another call or unholds the original call.

Monitoring tips

- More than one supervisor can log on to the same skillset.
- An agent can be monitored by only one supervisor at a time.

- While you are on a call, do not initiate a monitoring session.
- You must use a two line display telephone.
- Use a headset rather than handsfree when you monitor calls. This ensures call privacy and reduces the office noise level. Check the documentation for your telephone to make sure that you can use a headset with it.

Note: You cannot monitor an agent who is:

- on a conference call
- using an Answer DN
- on an ISDN or Companion set
- on any type of call if the maximum number of conference bridges (6) are being used

Monitoring skillsets

Use [ ] 9 0 9 (Display Waiting Calls) to view information about skillsets and the calls waiting in skillsets. The table below describes the information in each display.

Display	Description
Skill 1: Enabled	the skillset number and the status of the skillset. The status can be Enabled, Disabled or Uninit (uninitialized).
1: 6 agents	the skillset number and how many agents are currently logged on to the skillset
1: 10 calls	the skillset number and the number of calls waiting in the skillset
1: wait 9:45	the skillset number and the longest time a call has been waiting in the skillset.

Display Waiting Calls lets you know when a skillset in your contact center gets very busy. You can ask qualified agents to log on to the busy skillset.

To monitor skillsets

1 Press [✆] [9] [0] [9].
The skillset display for skillset 1 appears.

On a one line display telephone press	On a two line display telephone press	To
[1]	[1] or GOTO	enter the number of the skillset you want to monitor
[2]	[2] or SKILL	go to the next skillset
[3] or [6]	[3] or [6] or NEXT	monitor the next enabled skillset
[4]	[4] or PREV	go to the previous menu
[#]	[#]	go to the next menu
[*]	[*]	cancel the session
[☎]	[☎]	exit

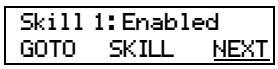
Note: If at any time during a monitoring session you press a programmed memory key your monitoring session ends. Do not press a memory key unless you want to end your monitoring session.

Note: If you have the Reporting for Contact Center option enabled, you can monitor and record call activity from a computer that is running Reporting for Contact Center. You need a keycode to use Reporting for Contact Center. Contact your vendor if you are interested in purchasing or trying Reporting for Contact Center.

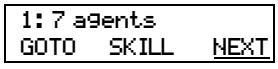
An example of monitoring skillsets

In the example shown here, there are calls waiting in skillset 1. In this situation, after you monitor the skillsets, you can ask any qualified and available agents from another skillset to log on to skillset 1 until the calls in skillset 1 are handled.

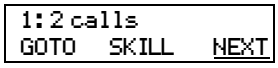
1 Press [✆] [9] [0] [9].



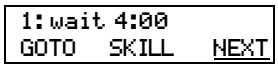
2 Press NEXT to monitor skillset 1.
In this example, skillset 1 is enabled and appears on the display first. If skillset 1 is not enabled, press NEXT to go to skillset 2.
To monitor the next skillset, press SKILL at any time.
To monitor another skillset, press GOTO and enter the skillset number.



3 The display shows the number of agents logged on to skillset 1.
Press NEXT.



4 The display shows the calls that are currently waiting to be answered by agents in skillset 1.
Press NEXT.



5 The display shows that the call waiting the longest in skillset 1 has been waiting for four minutes.

6 Press ☎ to end the session
or
press GOTO to monitor another skillset and enter the skillset number
or
press NEXT to monitor skillset 2.

To monitor calls using a one or two line telephone

You can monitor calls using a one line telephone. While you are using ✆ 9 0 9, on a one line or a two line telephone you can:

- press 1 for GOTO to enter the number of the skillset you want to monitor
- press 2 for NEXT
- press 3 or 6 for SKILL to monitor the next enabled skillset
- press 4 for PREV to go to previous menu
- press # to go to the next menu
- press * to cancel the session

Using a memory button to monitor calls waiting in skillsets

Program a memory button with ✆ 9 0 9 to view the status of all skillsets, including the skillsets that you are logged on to. If the memory button you choose has an indicator, the indicator shows information for the calls for the skillset that you are logged on to. For information about programming a memory button, see "Programming a memory button with a Feature Code" on page 27.

- If the indicator is off, all of the calls are within the acceptable wait time.
- If the indicator is flashing slowly, at least one call has exceeded the first alert time.
- If the indicator is flashing quickly, at least one call in the skillset has exceeded the second alert time.

For information about setting the wait times, see "Setting Contact Center general properties" on page 34.

For information about Primary and Secondary alert times, see Primary and Secondary alert times in "Skillset properties" on page 48.

Taking some Not Ready time

If you use [✆] [9] [0] [8] (Not Ready), you do not receive Contact Center calls. You can program a Break Time, which makes Contact Center automatically wait a short time before it routes the next call to you. You use Break Time to complete any tasks, such as paperwork, required by the last call. If you need some extra time, use Not Ready to prevent Contact Center from routing another call to you. Do not use the Do Not Disturb feature. You can use Not Ready while a call is ringing on your telephone. The call that is ringing on your telephone goes back to the skillset. You can program a memory button with an indicator instead of pressing [✆] [9] [0] [8].

For information about programming a memory button, see "Programming a memory button with a Feature Code" on page 27. For more information about Break Time, see "Break Time" on page 49.

Note: While you use Not Ready, you still receive non-Contact Center, intercom and transferred calls.

To use Not Ready

1. Press [✆] [9] [0] [8]. `Make Not Ready` appears on the display.
   If you press [✆] [9] [0] [8] and `Break canceled` appears on the display, you canceled the Break Time that the Contact Center Administrator programmed for you. You must press [✆] [9] [0] [8] again to activate the Not Ready feature.
   If you press [✆] [9] [0] [8] and `Agent active` appears, the Not Ready feature was on and you canceled it. Press [✆] [9] [0] [8] again to activate Not Ready.
2. When you are ready to take calls again, cancel the Not Ready feature by pressing [✆] [9] [0] [8].
   If `Not ready` appears, press [✆] [9] [0] [8] again.
   Not Ready is automatically enabled if you do not answer your telephone, and if this option is configured in Contact Center.

Programming Not Ready to a memory button

You can have convenient, one button access to Not Ready if you program a memory button with the Not Ready Feature Code. If the memory button you choose has an indicator, the indicator shows your busy status:

- If the indicator is off, Not Ready is off.
- If the indicator is on, Not Ready is on.
- If the indicator is flashing, the Break Time feature is on.

For information about programming a memory button, see "Programming a memory button with a Feature Code" on page 27.

Logging off

Log off when you complete your shift or will be away from your telephone for an extended period.

To log off

1. Press ✆ 9 0 4.
2. Enter your Agent ID and press OK or #.
3. Enter your password and press OK or #.
4. Press OUT. If OUT does not appear, you are not logged on to any skillsets.
5. Press CHNG until the skillset you want to log off from appears on the display. If you are logged on to only one skillset, that skillset is automatically selected.
6. Press OK.
7. You are logged off from the skillset number displayed, or from all skillsets if ALL is displayed.
8. Press ☎.

Changing your password

Keep your password confidential. Change your password regularly, about every 30 days.

To change your password

1. Press ✆ 9 0 4.
2. Enter your Agent or Supervisor ID number and press OK.
3. Enter your password and press OK.
   The default password you enter to log on for the first time, or if your password is reset, is 0000. If you use the default password you must change your password.
4. Press ADMIN.
5. Enter a new password from four to eight digits long and press OK.
6. Enter your new password again and press OK.
7. Press ☎.

Supervisor Help

With Supervisor Help an agent on a call can request help from a supervisor by pressing a programmed feature button. The agent can send an urgent request for help without interrupting the call, and without the caller being aware of the agent's help request.

Supervisor Help is for situations where an agent is on a call and urgently requires the help of a supervisor without alerting the caller that a supervisor is being called in. It is not intended for routine consultations or when the agent is not on a Contact Center call.

A supervisor who receives a help request can accept, deny, or ignore it. A request that is denied or ignored is escalated, and a larger group of supervisors is notified of the request. A supervisor can choose to escalate a request so that it is broadcast to other supervisors who may be better able to handle the request. If a supervisor receives a request while they are not at their set, their [ ] 9 0 6 indicator flashes slowly to inform them of the missed request.

If a help request is escalated to a supervisor, their [ ] 9 0 6 indicator flashes quickly to inform them of the request. If the call for an escalated help request is still active, the supervisor can accept the request by pressing the [ ] 9 0 6 feature key. They do not have to be monitoring agents at the time, but can be answering Contact Center calls.

Note: Supervisors who use Make Busy [ ] 9 0 8 are still available for help requests.

When a supervisor accepts an agent's request for help, a Silent Monitor session starts and the supervisor begins monitoring the agent's call. The agent who requested help is informed when the monitoring session begins. If the supervisor is already monitoring the call of the agent who requests help, the supervisor is considered to have accepted the request for help.

How Supervisor Help works

To use Supervisor Help supervisors must have a memory button programmed with the Supervisor Help feature code [ ] 9 0 6. The programmed key must have an LCD indicator. The memory button can have a distinct bright color so it can easily be distinguished from the other buttons. For information about programming a memory button, see "Programming a memory button with a Feature Code" on page 27.

When a supervisor is selected to answer an agent's help request, the supervisor's telephone rings once with a distinctive tone, and the Supervisor Help LCD indicator lights up and a message appears on the supervisor's display to accept or deny the call.

As soon as the supervisor accepts the request, Contact Center starts a Silent Monitor session between the supervisor and the agent.

If the supervisor denies or ignores a help request, the request is escalated. The [ ] 9 0 6 indicator flashes quickly on the sets of all supervisors who are notified of the escalated request. Active escalated requests take precedence over missed requests, so the Supervisor Help LCD indicator does not flash slowly if there are active requests that have not been accepted.

An escalated request goes to supervisors as follows:

No supervisors are available	the request escalates to all potential supervisors. If escalation is system wide, a potential supervisor is any logged on supervisor. If escalation is skillset based, a potential supervisor is one who is logged onto the requesting agent's skillsets.
The request is denied by the selected supervisor	the request escalates to all potential supervisors except for the selected supervisor, unless the selected supervisor is the only potential supervisor.
The request is ignored	the request escalates to all potential supervisors.

Agents can request Supervisor Help only if they are on an active Contact Center call. They cannot use Supervisor Help if they are not logged in, not ready, idle, have a call on hold, or are on a non-Contact Center call. An agent can cancel Supervisor Help at any time before a supervisor answers the request.

When an agent requests Supervisor Help, Contact Center looks for a single suitable supervisor to handle the request. If no supervisor is available, or the selected supervisor denies or ignores the request, the request is escalated. You set up supervisor selection to be either system wide or skillset based. System wide selection looks for all the available supervisors. Skillset based selection looks for only the supervisors who are assigned to the skillsets the agent is logged on to.

Configuring Supervisor Help

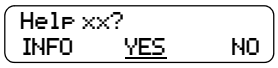
To set up Supervisor Help you must configure the general Contact Center properties for request timeout and supervisor selection method.

For information about	Refer to
Supervisor Help settings	"Setting the Supervisor Help request timeout" on page 36 "Selecting skillsets supervisors can receive help requests from" on page 38

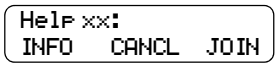
To handle Supervisor help requests

Supervisors can program the Supervise feature (F906) onto a memory button of their telephone.

1 Launch Supervisor Help by pressing [✆] [9] [0] [6] or the F906 memory button on your telephone.



2 The display shows the ID of the agent who is requesting help.
Press YES to accept the agent request for help
or
press NO to escalate the request
or
press INFO to view the agent name, time and date of the request, caller ID and caller name of the agent's call.



3 The display shows the ID of the agent you are helping.
While you monitor the agent, you can press the INFO key to view the time and date of the request, caller ID and caller name of the agent's call.
You can press the JOIN softkey or the MUTE button on your telephone to join in the call.
NOTE: Depending on what system you use, the Join and Mute softkeys may not appear.

4 When the help session is complete, press [☎] to end the session.

How to handle missed requests

When a supervisor's Supervisor Help LCD indicator is flashing, the supervisor can retrieve escalated or missed Supervisor Help requests.

If there are one or more requests, Contact Center shows all of the requests. Escalated requests for calls that are still active are shown first, from the oldest to most recent. After that, missed requests are shown from the oldest to the most recent.

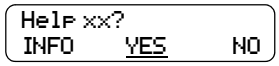
A supervisor can accept the call by pressing the YES softkey. After the supervisor accepts the request, the request no longer appears to other supervisors who are retrieving help requests. Their displays show the next escalated request, or the first missed request if there are no more escalated requests, or "No help requests" if there are no more missed requests.

For a missed request, the prompt "xx:aname asked" appears, and the supervisor can retrieve information about the call by pressing the INFO softkey, or can move to the next request by pressing the NEXT softkey.

An example of retrieving an escalated request

The supervisor launches the Supervisor Help feature by pressing the Supervisor Help (F906) feature key.

1 Launch the Supervisor Help feature by pressing [ ] 9 0 6 or the F906 memory button on your telephone.



2 The display shows the ID and name of the agent requesting help.
Press YES to accept the help request
or
press INFO to see more information about the request
or
press NO to deny the request. This escalates the request, and the display shows the next help request, if there is one.

3 When the help session is complete, press [ ] to end the session.

For a missed request, the prompt "aa asked help" appears".

After a missed request is viewed by a supervisor, it is not shown to any other supervisor.

Chapter 12
Tips for operating Contact Center

This chapter has tips on improving the operation of Contact Center.

Agent administration

- Agents can log on to any telephone on the system.
- Contact Center has an Auto Busy Mode feature that ensures that calls do not ring indefinitely at an abandoned agent set. If an agent does not answer a call within a specified number of rings, the call returns to the skillset to be presented to another agent, and the telephone is placed into Auto Busy Mode by Contact Center. The agent must manually cancel Auto Busy Mode to resume accepting calls.

Skillset administration

- If a call comes in on a line that belongs to a skillset with no available agents, the call is not answered until either the Delay Answer Time elapses or an agent becomes available for the call.

  During the Delay Answer period when the caller hears ringback, the line the call comes in on still rings on the sets configured to answer this line.

  If your contact center has long Delay Answer Times (longer than about 10 seconds), in your greeting specify to callers that their call is being tracked by Contact Center. Otherwise, it is possible for callers not to understand the long ringback delay and hang up.

Contact Center greetings

- Record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, waiting callers must wait longer before they hear a greeting. The longest recorded greeting for a skillset affects the frequency with which callers hear greetings. If your greeting length times vary a lot, there is a very large variance in how often callers hear greetings. Therefore it is best to keep greetings similar lengths if possible, about 20 seconds each.
- Ensure that when you record a greeting that transfers callers to a skillset mailbox you include in the greeting: "*To leave a message in the mailbox press* 9 " (or the keypad button you designate for the skillset mailbox).

Routing Table administration

- Use Forced Play greetings sparingly. If you use Forced greetings, keep them as short as possible. Many long Forced Play greetings slows transferring calls to agents and causes unpredictable increases in distribution times. Calls in other skillsets are not affected.

- When a Forced Play greeting plays for the highest priority call in a skillset, the other lower priority calls in the skillset have to wait even if agents become available during this time. For example, the longest waiting call, which is the highest priority call, gets routed to a Forced Play greeting. Agents become available during the time that the highest priority call is played a Forced Play greeting. The result is that no calls in this skillset are routed to an agent until the Forced Play greeting is finished playing to the highest priority call. This guarantees that the highest priority call is answered before lower priority calls in the skillset.

- Ensure that an Intelligent Caller Input Routing, Basic transfers calls to a skillset mailbox if you want callers to be able to press 9 to leave a message in a skillset mailbox. Remember to mention in the greeting to press 9 to leave a message in a mailbox.

- Program Intelligent Caller Input Routing, Basic to transfer calls to a skillset mailbox for Non-business hours greetings so that you do not miss any messages.

- If a Goto step follows a greeting, make a Distribution step the target for the Goto step. If you make the Goto target step after a Greeting step another Greeting step, callers hear two greetings in a row.

Contact Center general parameters

- Do not assign all the available voice channels as reserved channels. Otherwise, there will be no channels available for voice mail.

- A reserved or voice channel is used when:
  - a Contact Center greeting is played to a caller
  - Off-premise Message Notification notifies you of a message in a skillset mailbox

How to calculate the longest time a caller can be on hold

The formula used to calculate the longest wait time a caller can be on hold without hearing a greeting is:

$$\text{Wait Time} = \left[\left(\frac{\text{maximum calls}}{\text{voice channels}}\right) - 1\right] \text{ x maximum greeting length}$$

where:

- **wait time** is the longest time in seconds that a caller can be on hold without hearing a greeting
- **maximum calls** is the maximum number of calls that Contact Center can normally handle
  - In a contact center where external calls are **not** transferred or forwarded to Contact Center, the maximum number of calls is the same as the number of lines programmed to be answered by Contact Center
  - In a contact center where external calls **are** frequently transferred or forwarded to Contact Center, the maximum number of calls is the total number of lines on the system.
    For information about how calls transfer to a skillset, see "How incoming calls are sent to a skillset" on page 47.
- **voice channels** is the estimated number of voice channels available to Contact Center
  - The minimum number of voice channels available is equal to the number of reserved channels you set up in General Contact Center parameters. Additional channels that are not used by CallPilot can also be used. For example, even though you assign two reserved channels when you set up the General Contact Center parameters, Contact Center can use additional voice channels if and when they are available.
- **maximum greeting length** is the duration of the longest greeting of a skillset in seconds

Tips to improve the efficiency of Contact Center

Plan for busy times:

- when you assign agents to the skillsets, assign as many qualified agents as possible to answer calls for the skillsets
- have more agents log on to a skillset when it gets busy

Plan for slow times:

- for example, if agents are logged on to skillset 1 only, ensure that incoming calls to skillset 2 overflow to skillset 1. When you set up skillset parameters for skillset 2, assign a time to the Overflow parameter. Then callers can still speak to an agent.
- When no agents are logged on to any skillset, ensure that the Contact Center greetings you use for the Routing Table have Transfers set up. If a Contact Center greeting transfers to a skillset mailbox, callers can press 9 to leave a message in the skillset mailbox. Ensure that the greeting includes that callers can press 9 to leave a message in a mailbox. 9 is the default keypad button callers can press to transfer to the skillset mailbox. You can select a different number.

Chapter 13
Troubleshooting Contact Center

This chapter contains troubleshooting information for problems that can occur while setting up and operating Contact Center.

Resetting passwords

You can reset passwords if they are lost or forgotten.

To reset	see
the Operator password	page 193
the Contact Center Administrator password	page 41
a skillset mailbox password	page 72
an agent password	page 130

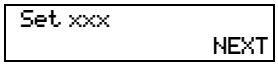
Resetting the Operator password

You can reset the Operator ([✆] [9] [8] [2]) password if it is lost or forgotten.
[✆] [9] [8] [2] is used by the receptionist, Operator and Contact Center Administrator.

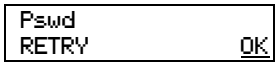
If you reset the Operator password it is reset to [6] [7] [3] [7] [2] [8] [6] [7] (Operator).

To reset the Operator password

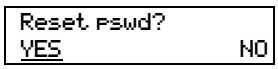
1 Press [✆] [9] [8] [5].



2 Press [7].
In this example, xxx represents the CDN for skillset 1.



3 Enter [7] [3] [7] [3] [8] [6] [7] [3] [7] [7] [7] [9] [3] (Resetoperpswd) and press OK.



4 Press YES.

5 The session ends.
The Operator password is now reset to [6] [7] [3] [7] [2] [8] [6] [7] (Operator.)

Agent problems

Agent log on problems

If an agent cannot log on at their telephone:

- ensure the agent ID and password match
- check to see if the agent is already logged on to a different telephone
- check to see if a different agent is logged on to this telephone

Important considerations about how agents use features

Call Transfer

Agents can use Transfer to transfer a call to another agent, another person such as a subject matter expert, or send the call back to a skillset.

- If the agent wants to send the call to a specific agent or another person, the agent can enter the Transfer Feature Code ([✆] [7] [0]) and enter the extension number.
- If the agent wants to send the call to a skillset, the agent can enter the Transfer Feature Code ([✆] [7] [0]) and enter the CDN of a skillset to send the call to a skillset.
- If you are monitoring an agent and they transfer a call, you do not continue to hear the call.

Agents who want to transfer a call to a mailbox should use [✆] [9] [8] [6].

Multimedia Contact Center agents do not receive Contact Center voice calls, but other Contact Center agents can transfer voice calls to Multimedia Contact Center agents.

Call Forward

Advise agents not to use Call Forward. An agent who uses Call Forward is automatically logged out or made auto busy, depending on their agent settings, after the number of rings for transfer callback elapses. Agents can use Call Forward to the voice mail DN.

Answer DN

If you are doing silent monitoring, the only way agents should use Answer DN is if they program their portable set to be the Answer DN for their main telephone. This is because you will not be able to monitor calls that agents answer on their Answer DN. You can only monitor calls that agents answer from the set they are logged on to.

If an agent uses their Answer DN telephone to answer a call that is transferred to them, Contact Center does not recognize the agent as being busy, and still sends calls to the agent's main set.

Agents who log on from a regular telephone and answer Contact Center calls using an answer DN key from a portable telephone cannot use Supervisor Help.

Do Not Disturb

Instead of using Do Not Disturb, agents must use the Not Ready Feature Code (⌂ 9 0 8). If agents use Do Not Disturb they are automatically logged out or made not ready after the first call.

Call Forward No Answer

When an agent's phone is on Call Forward No Answer to the voice mail extension, the number of rings for Call Forward No Answer must be less than the number of rings for Transfer Callback Timeout. If a call is forwarded by CFNA to another agent and is answered by that agent, the original agent who has CFNA setting is made Not Ready or logged out instead of staying idle.

Preventing calls from ringing at an agent's set

To prevent agents who are on a Contact Center call from having a second internal call ring on their phone, set the Call Forward on Busy feature for your set to the voice mail DN.

Hunt groups

Do not program an agent telephone to be a member of a Hunt Group.

Automatic Answer

How Automatic Answer works depends on what type of telephones your contact center uses:

- **WLAN Handset 2210/2211**: There are two ways to set up the WLAN Handset 2210/2211 for the Automatic Answer feature in a Contact Center environment:
  - Place the WLAN Handset in the active (idle) state. When the call is received by the WLAN Handset, the handset automatically switches to the active (off-hook) state and the call proceeds as normal. **Note:** In the active (idle) state, WLAN Handset power consumption increases, which causes a decrease in the life of the battery (the time before a recharge is required). The handset is not normally left in the active (idle) state except for special situations.
  - Place the WLAN Handset in the standby state. When the call is received by the WLAN Handset, the handset automatically answers the call, but it cannot maintain the call. You must press the **Power on/Start Call** key before the call is dropped (after about 5 seconds) to maintain the call. If you do not press the **Power on/Start Call** key in time, the call is dropped. The user must end every call by pressing the **Power off/End Call** key to release the system resources.
- **Norstar telephones**: If you use a headset, calls ring at the telephone and the headset, but calls go to the headset.
- **Business Series Terminals**: If you connect the headset before you connect the telephone cable to the phone jack, calls goes to the handsfree speaker. If you plug in the telephone before you connect the headset, calls go to the headset as long as you have initialized the headset by pressing the headset button and then the release button. Calls always ring at the set. Every time you reconnect the headset you must initialize the headset.
- **T7316e**: This type of telephone is safe to use for Automatic Answer.

Silent Monitor

If agents answer calls using features like Answer DN or Call Pickup on a set they are not logged onto, you cannot monitor these calls. You can do monitoring for wireless sets (including Companion, KIRK and DECT sets), only if the agent logs onto the set.

Skillset problems

Problems changing skillset properties

If you cannot change a skillset's properties, there are two possible reasons:

- The Contact Center skillset is enabled.
  You must disable the Contact Center skillset before you can change the skillset properties.

- The skillset mailbox has the wrong extension number.
  Refer to "Determining a skillset mailbox number" on page 66 for how to determine a skillset's extension number. The extension number of the skillset mailbox must be the same as the Control DN of the skillset. If the skillset mailbox has the wrong extension, you cannot change the properties for a skillset mailbox.

Chapter 14
Contact Center Programming Record

For this programming task	see	on page
Record the Feature Codes used by Contact Center	Feature Codes	198
Record the line information for lines answered by Contact Center	Line answering	206
Record the Operator and Business Status settings	Operator/Business Status	199
Record the number of reserved channels and the Primary and Secondary Alert times	General Contact Center parameters	198
Record agent ID, agent name, Priority, supervisor status and skillset for each agent	Contact Center agents	202
Record Control DN, skillset name, MWI ext, Method, Break Time and Delay Answer time limit	Contact Center skillsets	200
Record agents assigned to the skillsets	Skillset assignments	203
Record the skillset mailbox name, skillset mailbox number, MWI extension and skillset mailbox password	Skillset mailboxes	204
Record the type of step and step parameters for Day and Night Routing Tables	Routing Tables	205
Record Line Answering details	Line answering	206

Note: Make copies of these pages as required.

Feature Codes

Feature code name	Dialpad buttons	Custom Feature Code
Display Waiting Calls	✆ 9 0 9	✆ 9 _____ _____
Open Mailbox	✆ 9 8 1	✆ 9 _____ _____
Log on/Log off	✆ 9 0 4	✆ 9 _____ _____
Supervise agents	✆ 9 0 5	✆ 9 _____ _____
Not Ready	✆ 9 0 8	✆ 9 _____ _____
Return to skillset on No Answer		✆ 9 _____ _____
Voicemail DN	✆ 9 8 5	✆ 9 _____ _____
Operator status	✆ 9 8 2	✆ 9 _____ _____

General Contact Center parameters

Number of Reserved channels	
CLID Parameter	No CLID Number Only Name & Number
Supervisor Help request timeout value	
Skillsets supervisors can receive help requests from	
Lines answered by Contact Center	

Operator/Business Status

Password **OPERATOR** (**67372867**)			
Receptionist or Operator available*		Y N	
Business open*		Y N	
Answer trunks		Y N	
Receptionist or Operator extension			
Contact Center Service*	Skillset Number ___	Auto	
		Manual	Day Night
	Skillset Number ___	Auto	
		Manual	Day Night

* These settings are usually changed by the receptionist or Operator on a daily basis.

Contact Center skillsets

Skillset parameter	Rules	Skillset #
Skillset name	Maximum 16 characters. Default is SKILLn	
Control DN (CDN)	Extension cannot be used by another telephone or peripheral	
MWI extension		
Method	Least Busy (default) or Preferred	
Break Time	Enter as mm:ss Minimum: 00 min 00 sec Maximum: 59 min 59 sec Default: 00:30	
Delay answer	Enter as mm:ss Minimum: 00 min 00 sec Maximum: 10 min 00 sec Default: 00:00	
Attendant extension		
Language		
Activity Codes	Prompted or Optional (default) You must have Reporting for Contact Center enabled.	
Expected Wait Time sample	2 - 256	
Expected Wait Time Increase Allowed	Enabled (default) or Disabled	
Initial Call Duration	00:00:01 - 24:00:00. Default is 00:03:00.	
Service Mode	Auto, Day, Night, 24 Hour (default)	

Contact Center agents

Agent ID	Agent name	Supervisor status (y or n)	Name and # of skillsets agent is assigned to	Auto answer (y or n)	Missed call option (Busy or Logout)	Priority

Skillset assignments

Skillset name and #	Agent ID and name	Priority

Skillset mailboxes

Skillset #	Mailbox name	Mailbox number (Control DN)	MWI extension	Mailbox password

Routing Tables

Skillset # _____ **Day or Night** _____

Step #	Type of step: Greeting, Distribution, Transfer, Disconnect, Go To	Step parameters

Line answering

Line #	**Skillset #**	**# of rings** (0 to 12) for Caller ID minimum 2 rings

Glossary

AA

See *Automated Attendant*.

Agent

An agent is a person who is assigned to answer calls for one or more skillsets in your contact center.

Agent ID

When you add an agent, Contact Center assigns an agent ID number you use to identify the agent. The agent uses their agent ID number and password to log on when they are ready to receive calls.

Alert times

Alert times are time limits that you assign for calls waiting in skillsets. If a call exceeds the Primary or the Secondary alert time limit, a programmed memory button indicator flashes. A slow flash means that a call has exceeded the Primary alert time. A quick flash means that a call has exceeded the Secondary alert time.

Attendant

The attendant is the person who you assign to answer an extension number. The attendant can be a receptionist, operator or target attendant.

Automated Attendant (AA)

The Automated Attendant is an automatic answering service. AA answers incoming calls with a Company Greeting and a menu of options. AA routes calls in response to a caller's dialpad selections. For a greater range of options and services for incoming calls, a Custom Call Routing (CCR) menu can be assigned to play instead of the Automated Attendant menu.

Automatic Answer

Automatic Answer is an agent parameter that force delivers calls to an agent. If Automatic Answer is enabled, the agent hears a tone that indicates that a call is delivered. The agent is automatically in the handsfree mode.

If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must manually answer the calls.

Break Time

Break Time is a time period you set up for agents to complete paperwork or other tasks after they finish a call. After an agent completes a call, no calls are routed to them for the Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code.

CCR

See *Custom Call Routing*.

CDN

See *Control Directory Number*.

Contact Center

Contact Center receives, holds and routes calls to agents in a contact center.

contact center

A contact center is a department or a business that uses Contact Center to handle numerous incoming calls. A contact center typically employs several agents to answer calls.

Contact Center Administrator

The Contact Center Administrator sets up, and manages the day-to-day operation of a contact center. The Contact Center Administrator monitors the overall performance of the contact center and balances the staffing according to call traffic demands.

Call Forward All Calls (CFAC)

This feature forwards all calls from a telephone to another extension number. For example, all calls from a telephone can be forwarded to the CDN of a skillset.

Call Forward No Answer (CFNA)

This feature forwards unanswered calls from a telephone to another extension number. A call is considered unanswered if no one answers the call before a specified number of rings.

Call Forward On Busy (CFB)

This feature forwards all calls from a telephone to another extension if any of the lines assigned to the telephone are busy.

Channel

A channel is the voice path that Contact Center uses to play greetings to callers. A voice channel is also the voice path used when anyone uses a Feature Code to access Contact Center.

Class of Service

The Class of Service defines the values for mailboxes.

Control Directory Number (CDN)

The Control Directory Number (Control DN or CDN) is the extension number of a Contact Center skillset. The CDN is the number used to transfer calls to a skillset. The CallPilot installer is responsible for assigning a CDN to each skillset before the skillset can be enabled.

Custom Call Routing (CCR)

CCR is a routing feature that you can program to present a customized menu of single-digit choices to callers. CCR automatically answers lines and presents callers with customized menus. With CCR, callers can listen to pre-recorded messages, leave a message in a skillset mailbox or transfer to an extension. With CCR you can replace Automated Attendant menus with a more sophisticated menu that offers callers a wider range of options.

Delay Answer

Delay Answer is a feature that prevents Contact Center from answering calls and playing greetings when there are no agents available. When a skillset has Delay Answer activated, waiting callers hear ringback.

When a call comes in on a line for a skillset that does not have any free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever comes first.

Display Waiting Calls

Display Waiting Calls is a Feature Code that you and agents can use to display waiting calls and view real-time information about skillsets. The Display Waiting Calls/Skillset Status Feature Code shows:

- the skillset number and whether the skillset is enabled or disabled
- number skillset of agents logged into the skillset
- number of calls waiting
- the longest wait time of a call

DN

DN is a Directory Number or an extension number.

Greeting Table

The Greeting Table determines which recorded greeting is played and which line is answered according to the time of day.

Indicator

See *memory button indicator*.

Intelligent Caller Input Routing, Basic

Intelligent Caller Input Routing, Basic lets callers direct their calls to an Operator, Automated Attendant, skillset mailbox, CCR Tree.

Intelligent CLID/DNIS Routing

CLID/DNIS Routing is the initial routing that Contact Center calls encounter. The CLID/DNIS Routing you set up lets Contact Center route calls quickly based on their incoming line number. Callers are routed to skillsets depending on who the caller calls, the line the call comes in on, or where the caller is calling from.

Longest idle

Longest idle is a method of call distribution that routes calls to the agent who has been available the longest. The other method of call distribution is Preferred.

MWI

See *Message Waiting Indication*.

Memory button indicator

Memory button indicators are the triangular-shaped LCD indicators on a telephone next to the memory buttons. Memory button indicators can be used to monitor call activity and view the Login/Logout status and the Not Ready status of agents.

Message Waiting Indication (MWI)

The Message Waiting Indication appears on a telephone display as *Message for you* when there are new messages.

Message Waiting Indication extension (MWI extension or MWI DN)

For each skillset mailbox, you can assign a telephone as the designated MWI extension. The Message Waiting Indication extension is an optional telephone number that indicates when a skillset mailbox has messages waiting. The MWI extension that you assign shows *Message for you* on the telephone display when there are new messages in the skillset mailbox.

Method of Call Distribution

The method of call distribution determines which of several available agents to route the call to. There are two methods of call distribution: Least Busy and Preferred. Least Busy routes calls to an agent who has been available the longest. Preferred routes calls to the agent with the highest priority (the best qualified agent).

Not Ready

Not Ready is a Feature Code that extends a Break Time if agents need additional time after a call to do paperwork or other tasks.

Off-premise Message Notification

Off-premise Message Notification is a feature that notifies you at a destination number when there are new or urgent messages in a skillset mailbox.

Priority

You assign a priority to each agent according to their qualifications. An agent can have a priority from 1 to 20. 1 is the highest priority. You can assign this priority to your most experienced agents.

Primary alert time

The Primary alert time is the first time limit that you assign for calls waiting in skillsets. If a call exceeds the Primary alert time limit, you are given a visual warning on programmed memory button indicators. The other alert time is Secondary alert time.

Make Not Ready (Return to Skillset)

Make Not Ready (Return to Skillset) is a property that controls how a call is treated if an agent does not answer the call. Make Not Ready assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Automatic Logout automatically logs an agent out of their skillset if they do not answer a call.

Real time

Real time is a term for when there is very little response time between when an event occurs and when the information about the event is displayed. You can monitor the real time or current situation of agents and call activity by using the Display Waiting Calls Feature Code.

Reserved channel

Reserved channels are voice channels reserved exclusively for Contact Center. Reserved channels are used to play greetings to callers waiting in a skillset. These channels ensure that CallPilot does not use all the voice channels. See also *voice channel*.

Routing Table

Routing Tables handle incoming calls for each skillset. A Routing Table determines the order of greetings and hold times for callers while they wait to be routed to an available agent.

Skillset

Skillsets collect and distribute calls for departments such as “sales” and “technical support”. If several calls arrive at the same time, the calls are held in a skillset where callers hear greetings and are put on hold until an agent is available.

Skillset mailbox

A skillset mailbox stores messages left by callers. The calls can be retrieved by designated agents.

Skillset name

The skillset name is a maximum of 16 characters. A skillset name is the same as the skillset mailbox name.

Subscriber

A subscriber is a mailbox owner.

Supervisor

A supervisor is an agent with supervisor status. A supervisor has additional capabilities, such as the ability to monitor calls between agents and callers.

Supervisor monitor

Supervisor monitor is a feature supervisors can use to monitor or participate in calls between agents and callers.

Voice channel

A voice channel is the voice path that Contact Center uses to play greetings to callers.

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